North King County Cities
Volume 2: Economic Data & Analysis
March 2005

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Carolyn Edmonds,
Metropolitan King County Councilmember
District One

Dear Partners in North County,

The Future is Here. The theme for this economic summit was carefully chosen. In the last 12 years, all five North County cities have undergone enormous change, either incorporating or doubling in size through annexations. Each city is developing its own distinctive character, yet all five share important ties. Now is the time to position North County cities as an economic force, to appeal to businesses and people to live, play and invest here.

Businesses, non-profits, educational institutions and governments must be active partners to effectively drive economic growth. I hope this study can be a starting point for all stakeholders to formulate a joint framework for the future. Now is the time to create the vision and begin to actively promote ourselves both locally and regionally.

The five municipalities of Bothell, Kenmore, Lake Forest Park, Shoreline and Woodinville have partnered with local businesses, non-profits and educational institutions to facilitate this study. We are on our way to making North County smarter, quicker and more decisive in this competitive market. By using the data from this study, we can combine existing local strategies and expand them into one comprehensive North County strategy.

I want to thank *Forward Shoreline*'s Chairman, Jeff Lewis, for his collaboration on this project. Jeff's support, leadership and strategic advice were invaluable.

Community assets attract talented people and capital investments. Effective infrastructure, excellent schools, community open space and parks, and cultural attractions all have a very direct impact on quality of life and therefore drive the economy and our ability to be competitive. As we move forward in our next steps, we need to define what features are necessary to keep North County a great place to live and work for generations to come.

The Future is Here today. It's time to get on the map as a regional player in the Greater Puget Sound Area.

With Best Regards,

Carolyn Edmonds
Metropolitan King County Councilmember,
District One

Jeff Lewis,
Forward Shoreline Chairman

Dear North King County Citizens and Employers:

On behalf of my fellow volunteers in *Forward Shoreline*, I wish to acknowledge what a pleasure it has been to serve as project managers for the North King County Economic Summit. The CEO Survey and Summit accomplishes two things: *it opens eyes and opens avenues.*

The data has opened eyes to the breadth of opportunities in North King County. There are opportunities for business growth and development. There are opportunities for expanded communication and interaction between business, government and education. There is an opportunity for the opinion leaders of North King County to assert themselves in discussions about the economic future of the Puget Sound Region.

The North King County Summit has also opened wide avenues for further cooperation among the five cities. With respect to certain issues, we realize the benefit of thinking of ourselves as one unit instead of five. Transportation along the 522 corridor seems like one such issue for further collaboration. There are others. The avenue is now available for the five cities to continue to talk about economic development priorities and whether we can help each other in meaningful ways in the years ahead.

I wish to especially thank Metropolitan King County Councilmember Carolyn Edmonds for her leadership on this project. For the first time ever the five cities of North King County have come together to identify their strengths and understand their weaknesses. Her vision has started something great. I also want to acknowledge the fine work of Dave Endicott, of Endicott Consulting Group Inc. His public affairs and organizational skills are remarkable. Hebert Research is also to be thanked for their contribution of excellent research and creative thinking skills. The cities of Bothell, Kenmore, Lake Forest Park, Shoreline and Woodinville Mayors, City Council members and staff are to be thanked for supporting Councilmember Edmond's vision. Finally, our sponsors are to be thanked for their generosity in assisting the County, and Cities in funding this project.

The theme of this Summit is "The Future is Here." Whether your area of interest is world wide, regional or in one of the cities of the five North King County Cities, your future is here in North King County. Thank you for joining us today and in joining us as we assimilate what we've learned and identify our next steps.

If you would like to be included in future meeting notifications please email david@davidendicott.us .

Sincerely,

Jeffrey P. Lewis
Chairman, Forward Shoreline and
President and CEO, Shoreline Bank

Research Background and Objectives

Background

The North King County Economic Study was commissioned by King County Councilmember Carolyn Edmonds, in partnership with the Cities of Bothell, Woodinville, Shoreline, Kenmore and Lake Forest Park and *Forward Shoreline*, a non-profit corporation. The study includes an analysis of the North County economy in 2004 and a 2005 forecast.

Introduction to This Volume

The North King County Economic Study has been organized and presented in two volumes: Volume 1 includes the results of the survey of local employers and Volume 2 profiles the current economies of each city. In addition, the Executive Summary highlights the key findings of the entire study. This report represents the economic profile and analysis component (Volume 2) of the two-part study.

Objectives

The following objectives were addressed in conducting the economic research and baseline profile for the North King County cities:

- Develop a baseline profile of local employment by type of job/industry and city, North County area and King County
- Profile current business revenues by type of industry and city, area and county
- Determine number of businesses by industry and city, area and county
- Analyze industry concentration or specialization based on industry share of total city jobs (i.e. within each city, what industry segments are particularly well represented and which ones are under-represented?)
- Examine trends in population, households, families and housing units by city, area and county
- Profile trends in household incomes by city, area and county

Methodology

This volume contains demographic, business and industrial and employment data about the Cities of Bothell, Woodinville, Kenmore, Lake Forest Park and Shoreline, King County, the Seattle-Bellevue-Everett Metropolitan Statistical Area and the state of Washington. The demographic and business summary data is organized by geographic area.

The data is provided either as current year (2004) estimates, or is displayed in multiple years. The business summary data was only available in current year estimates, while other demographic variables are trended over time.

Claritas, Inc. generated most of the estimates used in this report. They utilize a database of 10 million U.S. companies maintained by InfoUSA. Information on the database is updated annually. Other sources used include *Office of Financial Management* for total population and housing units by city.

The data were analyzed using generally accepted techniques of economic analysis and data sources that in our opinion are the most appropriate choices for this project.

Hebert Research has made every effort to produce the highest quality research product within the agreed specifications, budget and schedule. The customer understands that Hebert Research uses those statistical techniques, which, in its opinion, are the most accurate possible. However, inherent in any statistical process is a possibility of error, which must be taken into account in evaluating the results. Statistical research can predict consumer reaction and market conditions only as of the time of the sampling, within the parameters of the project, and within the margin of error inherent in the techniques used.

Evaluations and interpretations of statistical research findings and decisions based on them are solely the responsibility of the customer and not Hebert Research. The conclusions, summaries and interpretations provided by Hebert Research are based strictly on the analysis of the data gathered, and are not to be construed as recommendations; therefore, Hebert Research neither warrants their viability nor assumes responsibility for the success or failure of any customer actions subsequently taken.

The Research Team

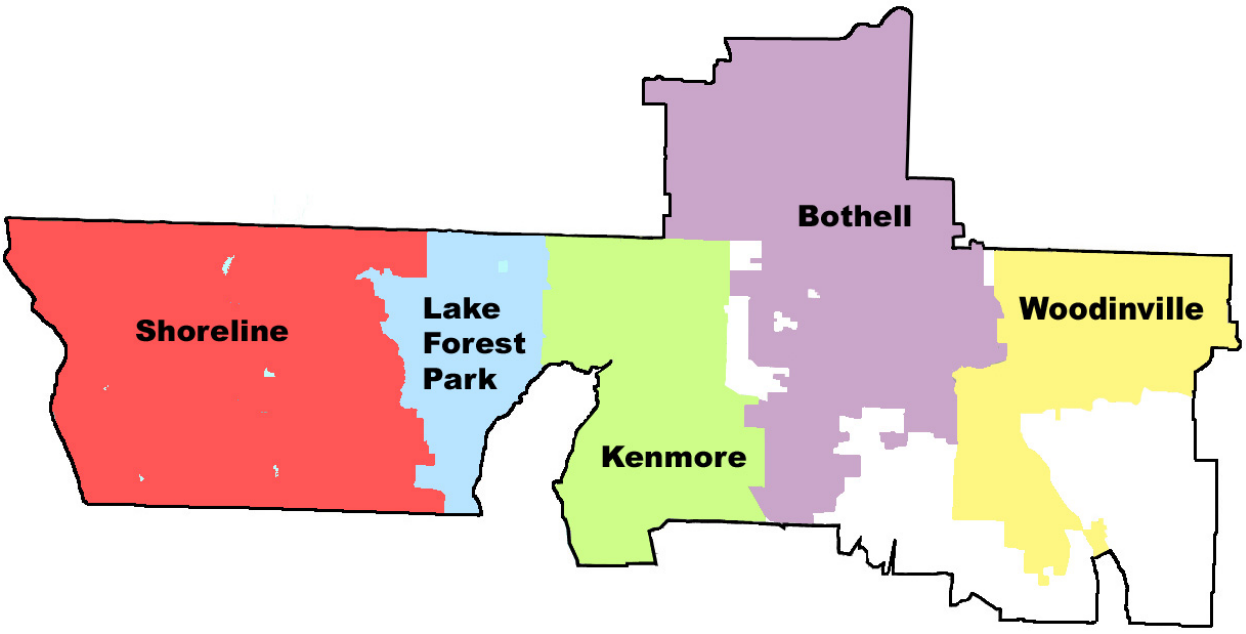
Hebert Research wishes to thank all of the team members who have the common vision and understanding that a united North King County will benefit by a common data base from which to make informed decisions regarding economic development. We look forward to seeing stakeholders define the next steps and find their path toward livable, sustainable communities.

Research Team Members:

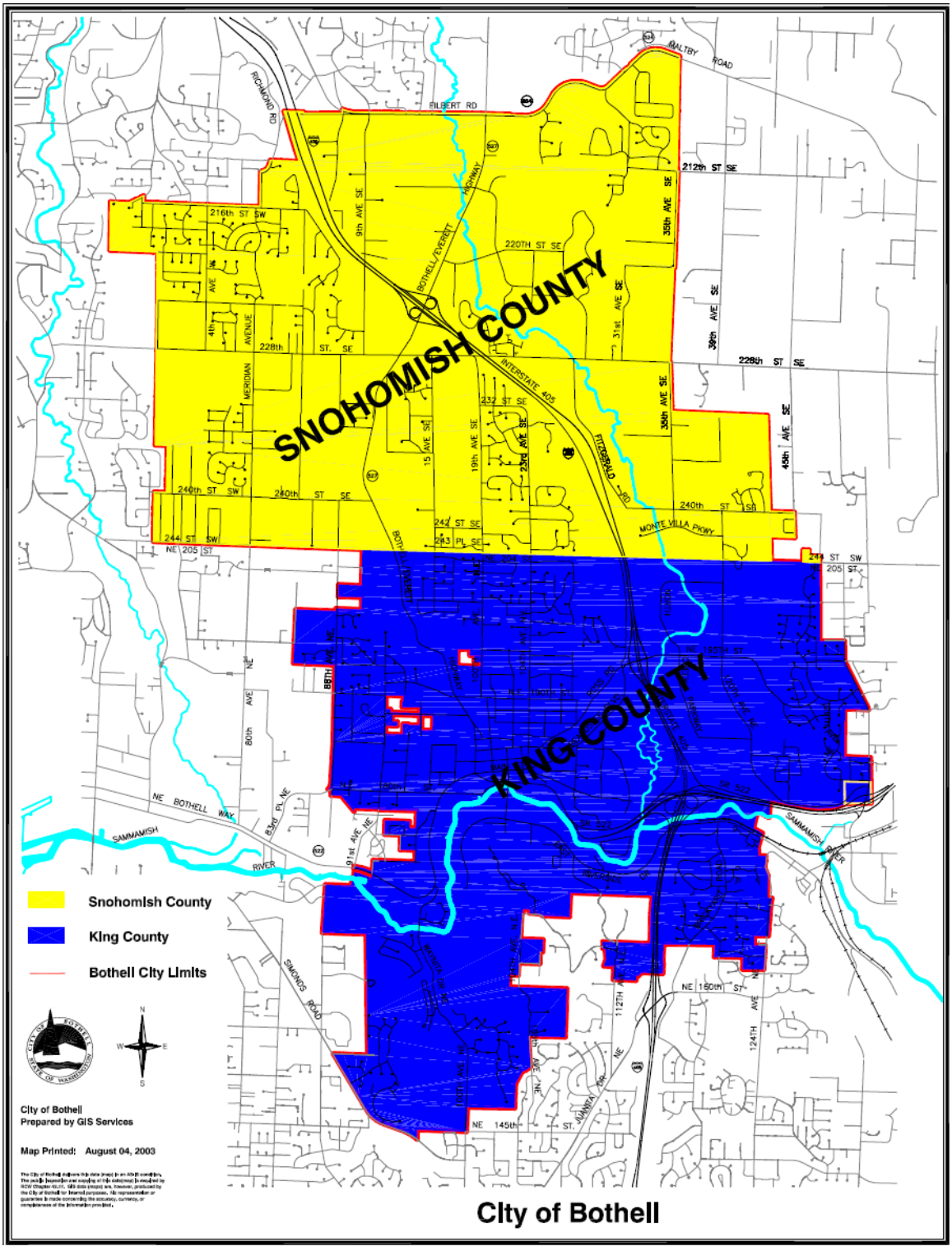
James D. Hebert, *President (Hebert Research)*
Susan Bond, *Research Director (Hebert Research)*
Paul Irby, *Director of Advanced Research (Hebert Research)*
Dr. Charles Russell, *Senior Economist (Hebert Research)*
Jerry Savage, *Senior Research Analyst (Hebert Research)*
Carlos Aragon, *Director of Analytical Research (Hebert Research)*
Carolyn Edmonds, *Metropolitan King County Councilmember*
Ritva Manchester, *Legislative Aide, King County Council*
Jeff Lewis, *Forward Shoreline, Chairman*
David Endicott, *Forward Shoreline, Executive Director*
Michelle Cable, *Forward Shoreline*
Larry Steele, *Forward Shoreline*
Steve Burkett, *Shoreline City Manager*
Bernard Seeger, *City of Shoreline, Management Analyst*
Carter Hawley, *Kenmore, Assistant City Manager*
John Hawley, *Lake Forest Park, Finance Director*
Sarah Philips, *Lake Forest Park, Community and Government Affairs Manager*
Carl Smith, *Woodinville, Community Development Planner*
Manny Ocampo, *Bothell, Assistant City Manager*
Kae Peterson, *Shoreline Community College Foundation President*
Rob Larsen, *ClearPath*

North King County Study Area

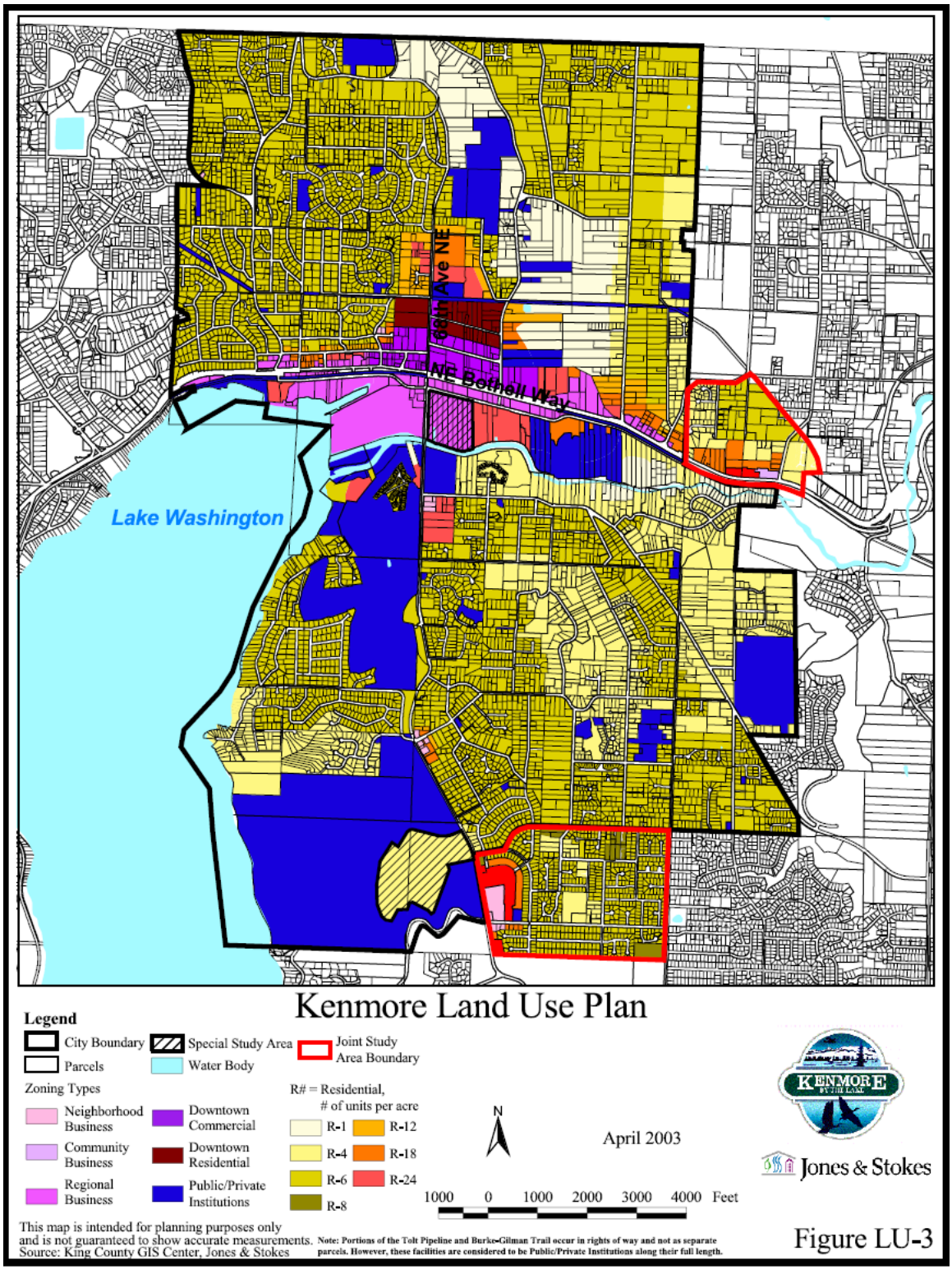
The following regional map illustrates the current city boundaries of each North King County city. The Bothell segment was included in the research in order to fully represent the entire geography of this city and to correspond with available business data that is based on the full city limit geographic definition.



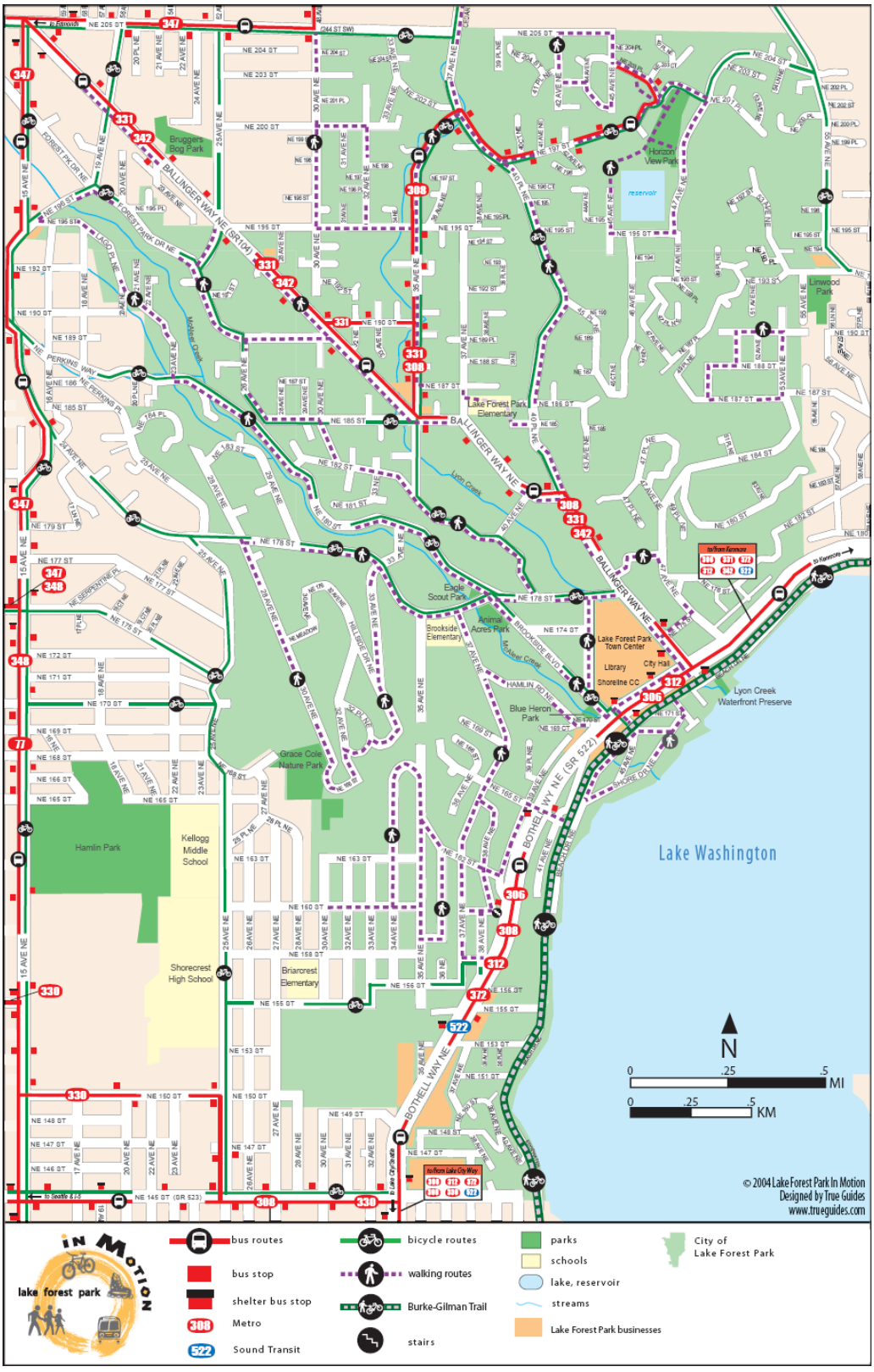
CITY MAP - BOTHELL



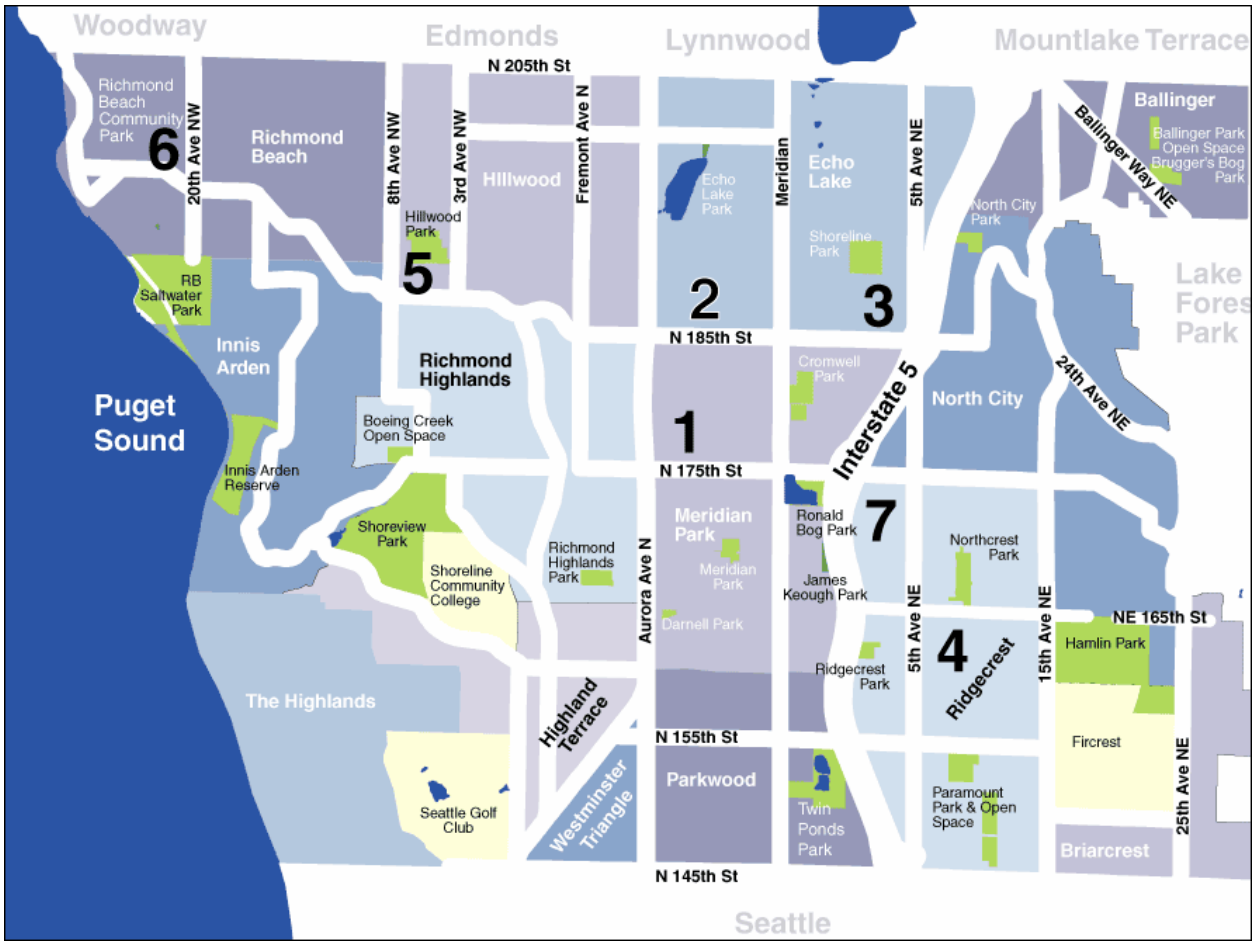
CITY MAP - KENMORE



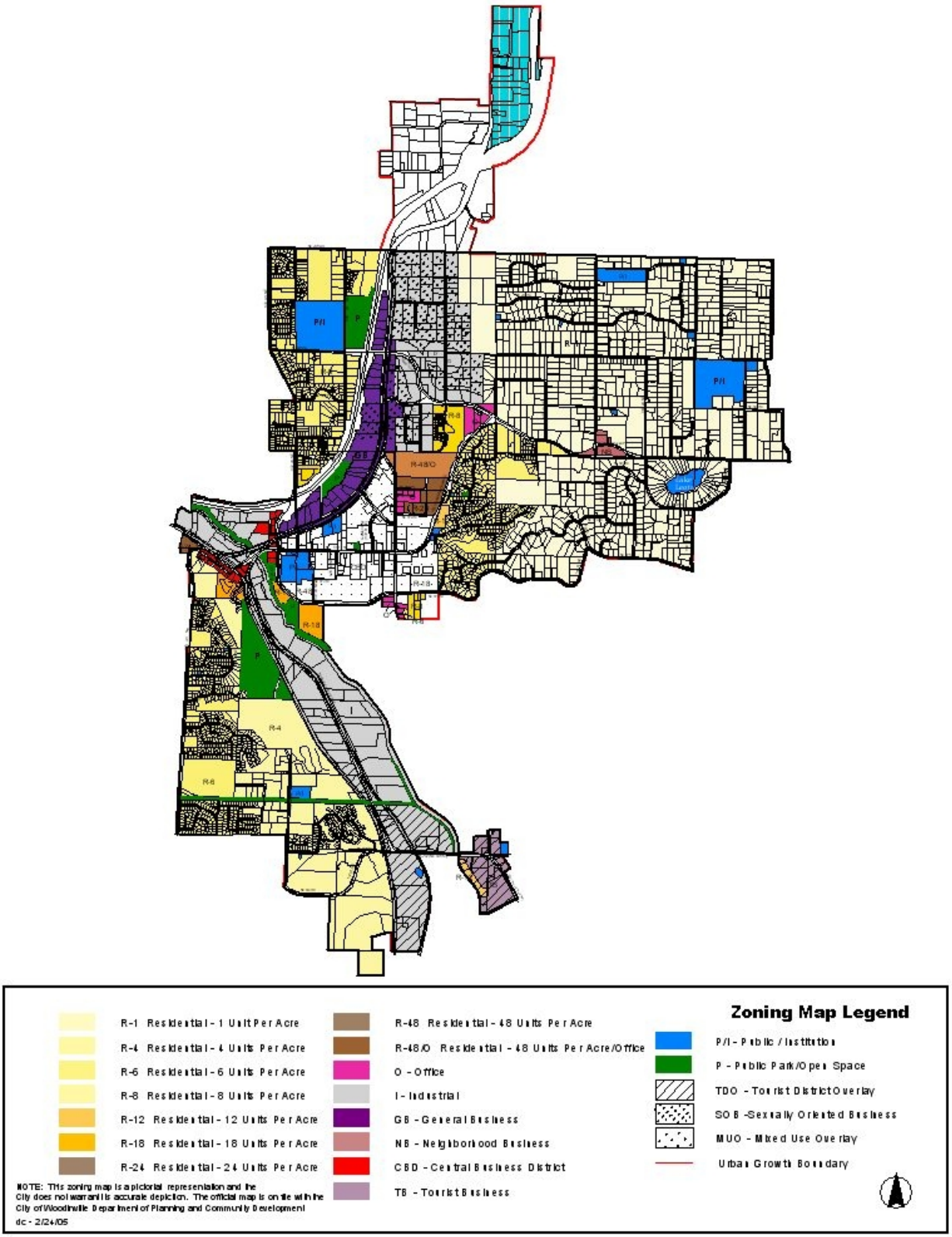
CITY MAP – LAKE FOREST PARK



CITY MAP - SHORELINE



CITY MAP - WOODINVILLE



Demographic Characteristics

Population

The North King County population has not grown at the same rate as the populations of King County, the Region and the State. Between 1990 and 2000, the North King County population grew by 11% compared to 15.2% in the County, 18.8% in the Region and 21.1% statewide. North King County population growth between 2000 and 2004 was less than 1%.

Population Comparison

Year	North King County	King County	Seattle MSA	Washington State
1990	112,395	1,507,312	2,033,149	4,866,692
2000	124,738	1,737,034	2,414,616	5,894,121
2004	125,525	1,784,619	2,510,743	6,182,560
% Chg. '90-'00	**10.98%**	**15.24%**	**18.76%**	**21.11%**
% Chg. '00-'04	**0.6%**	**2.7%**	**4.0%**	**4.9%**

**Source: Office of Financial Management for North County cities, Claritas for King, Seattle MSA and Washington*
Note: North King County definition includes Snohomish County segment of Bothell

In 1990, the North King County population comprised 7.5% of the King County population, 5.5% of the population in the Seattle MSA and 2.3% of the statewide population. In 2000, North King County had declined slightly as a percentage of the population in these larger areas. There was a continued decline over the last four years between 2000 and 2004. One should keep in mind that a decline in the *share* of regional and statewide population is an indicator of slower population growth, not of stagnant or negative population growth.

Percent County, State and MSA Population

Year	Percent of King County	Percent of Seattle MSA	Percent of Washington State
1990	7.5%	5.5%	2.3%
2000	7.2%	5.2%	2.1%
2004	7.0%	5.0%	2.0%

Households

North King County households comprised 6.9% of King County households in 1990, 5.3% of the households in the Seattle MSA and 2.3% of statewide households. By the 2000 Census, the North King County area had declined slightly as a percentage of households in these larger areas. A continued decline occurred between 2000 and 2004. The decline in households as a percentage of the larger regions is consistent with the North King County lag in population growth.

Household Growth Comparison

Year	North King County	King County	Seattle MSA	Washington State
1990	42,537	615,789	809,289	1,872,431
2000	48,487	710,916	963,552	2,271,398
2004	49,204	730,107	1,001,533	2,381,877
% Chg. '90-'00	**14.0%**	**15.4%**	**19.1%**	**21.3%**
% Chg. '00-'04	**1.5%**	**2.7%**	**3.9%**	**4.9%**

**Source: Claritas*

Percent County, State and MSA Population

Year	Percent of King County	Percent of Seattle MSA	Percent of Washington State
1990	6.9%	5.3%	2.3%
2000	6.8%	5.0%	2.1%
2004	6.7%	4.9%	2.1%

Average Household Income

Average household incomes in North County are comparable to those in King County and the region but are higher than Washington State averages. Since 1990 average household incomes have grown more slowly than in other parts of the state. This slower rate of growth could be due to changes in the population configuration.

Income Comparison

Year	North King County	King County	Seattle MSA	Washington State
1990	$47,402	$44,884	$44,117	$38,156
2000	$70,347	$71,101	$68,591	$58,653
2004	$75,305	$75,434	$73,458	$64,169
2009	*$80,905*	*$81,788*	*$80,128*	*$71,319*

**Source: Claritas*

North King County Income as a Percent of County, MSA and State Income

Year	Percent of King County	Percent of Seattle MSA	Percent of Washington State
1990	105.6%	107.4%	124.2%
2000	98.9%	102.6%	119.9%
2004	99.8%	102.5%	117.4%
2009	98.9%	101.0%	113.4%

Economic Characteristics

Employment

The total employment within North King County is equivalent to more than 5% of all the jobs in King County. The three areas in which North King County has a much higher share of King County jobs include construction (9.37%), wholesale trade (8.95%) and mining and agriculture (8.62%). These three industries are also more strongly represented when examined at the regional and statewide levels. The two industries where the percentage of jobs is generally less than the overall 5% level include finance (3.98% of King County jobs) and transportation/utilities (1.95% of county jobs).

North King County Share of Jobs By Industry

Business Description	Share of King	Share of MSA	Share of State
All Industries	*5.19%*	*4.19%*	*1.99%*
Manufacturing, except wineries	5.30%	3.90%	2.28%
Construction	9.37%	6.66%	2.93%
Retail, except restaurants	5.74%	4.50%	2.05%
Tourism-related	5.40%	4.45%	1.96%
Services, except hotels	4.68%	3.98%	1.94%
Finance/insurance	3.98%	3.30%	1.84%
Wholesale trade	8.95%	7.46%	3.12%
Transportation/communications/utilities	1.95%	1.73%	0.92%
Mining & agriculture	8.62%	5.83%	1.48%
Non-profit/membership organizations	4.07%	3.37%	1.49%
Public Sector	4.96%	3.17%	1.06%

**Source: Claritas*

North King County Employment Comparison

Business Description	North County	King County	Seattle MSA	Statewide
All Industries	*60,986*	*1,175,442*	*1,453,922*	*3,063,758*
Manufacturing, except wineries	6,457	121,877	165,602	283,292
Construction	4,605	49,145	69,110	157,204
Retail, except restaurants	8,157	142,048	181,234	398,324
Tourism-related	5,584	103,344	125,500	285,437
Services, except hotels	20,999	448,432	528,004	1,081,483
Finance/insurance	3,215	80,784	97,370	174,981
Wholesale trade	5,182	57,890	69,437	166,315
Transportation/communications/utilities	1,483	75,956	85,903	160,746
Agriculture & Mining	781	9,059	13,402	52,760
Non-profit/membership organizations	764	18,756	22,659	51,142
Public Sector	2,208	44,484	69,652	207,574

**Source: Claritas *Note: Totals in this table for manufacturing, retail and services have sub-categories taken out to highlight the "tourism" segment and show non-profits separately; consequently, they will be less than the totals shown in the summary tables on pages 54-80.*

Number of Employers and Revenues

North King County's manufacturing businesses equal 6.3% of all manufacturers in King County and 4.9% of the manufacturing firms in the region. North King County as a whole has 6.8% of the total manufacturing sales in the County – the slightly higher share of sales than business establishments. This points to the success of the cluster of manufacturing employers located in the major Northend office/industrial parks. The number of retailers in North King County is equivalent to 6.1% of King County's retailers and 4.7% of retail businesses in the region. However, the sales revenue associated with the North King County retail establishments comprises only 4.6% of King County sales and 3.2% of regional sales. The fact that the North King County cities under-index in sales relative to county businesses has to do with the lack of a major regional mall within the boundaries of the combined study area. Smaller community shopping centers and strip malls tend to have lower sales per foot than a large regional mall such as Alderwood Mall, Bellevue Square or University Village to the South.

Counting all industries and employers, North King County represents six percent of King County employers and 4.7% of employers in the region. These establishments generate a little over 5% of all King County revenues and 3.7% of regional sales.

North King County as a Percentage of King, Region and State

	Percent of King County	Percent of Seattle MSA	Percent of State
Manufacturing Businesses	6.2%	4.8%	2.2%
Manufacturing Sales	5.9%	4.1%	2.3%
Retail Businesses	6.3%	4.8%	1.9%
Retail Sales	5.6%	4.5%	2.0%
All Employers	6.0%	4.7%	2.0%
Total Sales All Industries	5.3%	3.7%	2.1%

Comparison of Establishments and Revenues

	North County	King County	Seattle MSA	State
Manufacuring Businesses	251	4,033	5,280	11,326
Manufacturing Sales (millions)	$491	$8,343	$11,910	$21,609
Retail Businesses	725	11,458	15,139	37,255
Retail Sales (millions)	$1,297.2	$23,265.9	$28,901.2	$64,615.7
All Industries - Employers	4,960	82,422	105,929	247,614
All Industries - Sales (millions)	$6,586.9	$124,264	$177,630	$313,448

**Source: Claritas Note: Retail does not include restaurants; manufacturing does not include wineries*

Summary

Despite slight declines in population and households as a percentage of King County, the Seattle MSA and the region, North King County remains a strong and vital economic community. Average household income grew more than 48% between 1990 and 2000, grew another 7.0% since 2000 and will grow an additional 7.4% by 2009. Average household income in North King County continues to be higher than the statewide benchmark level and is similar to county and regional averages.

More than 5% of the jobs in King County are in North King County. The largest numbers of employees were in the services, retail trade and wholesale trade areas. Excluding the wineries, less than 6,500 employees work in manufacturing. Manufacturing is commonly viewed as the source of the most stable and highest paying jobs. Retail jobs are among the lowest paying but support an important industry that contributes to the tax base and to a vital, sustainable community.

The data indicates that the retail industry is the strongest economic sector in North County. Of the $6.6 billion in total North King County sales, $1.3 billion or 19.7% is in the retail sector. These sales represent 5.6% of King County retail sales and 4.5% of sales in the region.

With the exception of the finance and transportation/utilities industries that are under-represented, North King County has a very diverse business community with at least a “normal” amount of jobs in all major industry sectors. Of course, in any one city there may be industry sectors missing or under-represented, but as a whole the five North King County cities together constitute a fully-functional micro economy, able to provide a comprehensive range of goods and services to meet local and/or regional needs. The data suggests that the strengths and unique characteristics of each individual city tend to complement each other so that as a single economic region, the area comes into balance.

The North King County Region – Key Indicators of Market Size (2004)

The five cities in the North King County area represent a combined total of 125,525 residents and 60,986 jobs. There are nearly 5,000 business establishments generating combined annual revenue of $6.2 billion not including the financial sector ($6.6 billion including estimates of revenue from banks and insurance companies).

Total Population

City	Population
Bothell	30,930
Kenmore	19,170
Lake Forest Park	12,770
Shoreline	52,740
Woodinville	9,915
North County	**125,525**

**Source: Office of Financial Management*

Total Employment

City	Employment
Bothell	19,410
Kenmore	4,439
Lake Forest Park	1,789
Shoreline	18,757
Woodinville	16,591
North County	**60,986**

**Source: Claritas*

Total Business Establishments

City	Businesses
Bothell	1,321
Kenmore	505
Lake Forest Park	298
Shoreline	1,599
Woodinville	1,237
North County	**4,960**

**Source: Claritas*

Total Business Revenues (shown without the finance/insurance industry)

City	Revenues (minus finance/ insurance)
Bothell	$2,044,300,000
Kenmore	$446,200,000
Lake Forest Park	$187,600,000
Shoreline	$1,781,400,000
Woodinville	$1,742,900,000
North County	**$6,202,400,000**

**Source: Claritas*

Total Business Revenues (all industries)

City	Revenues (total)
Bothell	$2,207,800,000
Kenmore	$469,500,000
Lake Forest Park	$202,700,000
Shoreline	$1,886,300,000
Woodinville	$1,820,600,000
North County	**$6,586,900,000**

**Source: Claritas*

"Location quotients" are measures of industrial specialization that compare the share of total employment within particular industrial categories to the share it represents within the state. This analysis found that Kenmore has 27% more service jobs than the statewide norm and Shoreline has 21% more. Woodinville has far fewer jobs in the service industry but over-indexes in tourism (49% more than the statewide average). Bothell and Lake Forest Park have essentially the same number of service jobs as the statewide average.

The table below describes the number of service employees and the proportion of total jobs within the four areas that are service related. As can be seen, North King County as a whole has essentially the same proportion as the state. The variance, therefore, is not among this economic area and the state but between the five North King County cities, which have very distinct micro-economies and differences in the mix of services.

Industry Share in Services (Except Hotels, Museums & Nonprofits)

Business Description	North County	King County	Seattle MSA	Statewide
Number of Employees	20,999	448,432	528,004	1,081,483
Industry Mix by Area, County, Region and State	34.43%	38.15%	36.32%	35.30%

Summary Table: Services (Except Hotels, Museums & Nonprofits)

	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodin-ville	North County	King County	Seattle MSA	State
Number of businesses	479	201	127	648	390	1,845	32,888	41,067	89,207
Number of employees	7,155	1,988	659	8,007	3,190	20,999	448,432	528,004	1,081,483
Annual revenues	**$749.5**	**$164.0**	**$69.6**	**$660.4**	**$324.9**	**$1,968**	**$43,568**	**$43,272**	**$100,258**
Jobs per business	14.9	9.9	5.2	12.4	8.2	11.4	13.6	12.9	12.1
Revenues per business	$1.6	$0.8	$0.5	$1.0	$0.8	$1.1	$1.3	$1.1	$1.1

**Note: Revenues are in millions*

In the area of finance and insurance, the proportion of jobs in North King County is slightly lower than the statewide proportion. Note, however, that Lake Forest Park has 54% more finance and insurance jobs than the statewide average while Woodinville and Kenmore under-index in this area.

Industry Share in Finance, Insurance and Real Estate

Business Description	North County	King County	Seattle MSA	Statewide
Number of Employees	3,215	80,784	97,370	174,981
Industry Mix by Area, County, Region and State	5.27%	6.87%	6.70%	5.71%

Services and Finance Continued…

Overall, financial sector businesses in North King County are about 70% of the size of the typical King County establishment, based on average revenues of $1.5 million versus $2.1 million per location countywide. Bothell, Shoreline and Woodinville had the highest averages while Lake Forest Park and Kenmore financial establishments were smaller. There were an average of 7.5 workers per firm in North King County, compared to 10.5 in King County.

Summary Table: Finance/Insurance/Real Estate

	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodin-ville	North County	King County	Seattle MSA	State
Number of businesses	140	40	28	142	77	427	7,687	9,743	29,098
Number of employees	1,307	166	157	1,090	495	3,215	80,784	97,100	174,981
Annual revenues	**$256.7**	**$35.7**	**$26.5**	**$198.2**	**$104.4**	**$622**	**$16,228**	**$19,633**	**$71,124**
Jobs per business	9.3	4.2	5.6	7.7	6.4	7.5	10.5	10.0	6.0
Revenues per business	$1.8	$0.9	$0.9	$1.4	$1.4	$1.5	$2.1	$2.0	$2.4

**Note: Revenues are in millions*

There is a high probability that the "smaller" size of financial services within the North King County region will begin to change as the region develops. The relocation of larger financial services employers in Seattle and the Eastside can be a direct function of proactive economic development efforts. The advantages of locating in North King County include a well-educated employment base, the accessibility to regional cultural and economic centers and amenities in Seattle, lower rents and taxes, and more favorable commercial zoning.

INDUSTRY PROFILE: Manufacturing

While manufacturing comprises a relatively small percentage of the total jobs in North King County, its share is typical for the region and state. Manufacturing normally only represents around 10% of all jobs, but these positions tend to be higher-paying than other entry-level jobs in retail or services, and the business activity of manufacturing helps support a wide range of other secondary industries such as wholesale, retail and services.

In the past, North King County was considered a bedroom community to Seattle. However, compared to Washington State and King County, this area actually has a greater share of manufacturing jobs. Generally, suburban communities surrounding major metro cities like Seattle either have no manufacturing or a share that is substantially less than statewide or county levels. The primary benefit North King County cities enjoy is that manufacturing has higher economic multipliers and therefore creates more indirect jobs and spending within the area.

While the North King County area as a whole is "normal" in the amount of manufacturing activity relative to the state, two cities within the region, Woodinville and Bothell, have a very high level of specialization in this area. In terms of their industry mix (percent of all jobs in the industry), these cities have far more manufacturing jobs than would be expected for their size. A total of 18.8% of Woodinville's jobs and 15.2% of Bothell's jobs are in manufacturing.

Industry Share In Manufacturing (Except Wineries)

Business Description	North County	King County	Seattle MSA	Statewide
Number of Employees	6,457	121,877	165,602	283,292
Industry Mix by Area, County, Region and State	10.59%	10.37%	11.39%	9.25%

Summary Table: Manufacturing (Except Wineries)

	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodin-ville	North County	King County	Seattle MSA	State
Number of businesses	65	18	8	38	122	251	4,033	5,280	11,326
Number of employees	2,945	196	43	249	3,114	6,457	121,877	165,602	283,292
Annual revenues	**$215.5**	**$8.5**	**$2.8**	**$20.9**	**$242.9**	**$491**	**$8,343**	**$11,910**	**$21,609**
Jobs per business	45.3	10.9	5.4	6.6	25.5	25.7	30.2	31.4	25.0
Revenues per business	$3.3	$0.5	$0.4	$0.6	$2.0	$2.0	$2.1	$2.3	$1.9

**Note: Revenues are in millions*

The two sub-sectors of manufacturing that have the greatest levels of concentration or specialization are both technology-oriented:

- *Chemicals and allied products (543% greater than the norm)*
- *Measuring instruments (506% greater than the norm)*

Each of these two areas of manufacturing have more than five times the "normal" concentration of jobs than would be expected for an economic region the size of North King County. This means that manufacturing is an area of convergence, drawing employees on a regional basis to work in North King County cities, and adding to the base of available consumer spending.

INDUSTRY PROFILE: Retail And Wholesale

The following are key factors contributing to retail sales within North King County:

A. *A large local base* of nearly 50,000 households.
B. *The ability of local specialty retailers and big box stores to successfully capture consumer spending from households outside of North King County*, adding to the local base of spending from residents.
C. *The ability of local retailers to target the captive base of nearly 61,000 local employees* who may choose to shop at a store on their lunch break or to and from their place of employment.
D. *Strong household incomes* at or exceeding regional norms, which allow for spending on discretionary and luxury items rather than merely basic household goods and services.
E. *A favorable age distribution* and household sizes that include many families with children – supporting a wide range of consumer purchases.

In thinking about retail development, there are basically three major types that will work in North King County:

A. *Community retail*, anchored by the local supermarket or drug store, which is supported by the local resident population. This type of retail will continue to be supported by increases in population, strong household incomes and further income growth within the five cities.
B. *Specialty retail*, that offers hard-to-find retail goods or a different type of atmosphere or experience, such as Molbak's, Sky Nursery and Country Village in Bothell. Specialty retail can provide a compelling reason to make a special shopping trip to a smaller suburban city rather than to a major mall location.
C. *Big box retail*, such as Costco or Home Depot. The positive effect of big box development is that it substantially increases the draw area for a local shopping center or retail district – turning it into a competitive destination rather than simply a local choice for convenience shopping.

At 13.4%, the proportion of retail trade jobs within North King County is equivalent to that in the state and is slightly greater than in King County. This indicates that the North King County area, as an economic region, has been able to compete in this area and while there is no major regional mall, within the five cities there are a diverse range of retail stores and shopping options that generally meet local needs and in some cases also meet regional needs and capture spending from out of the area.

Industry Share For Retail Trade (Except Restaurants)

Business Description	North County	King County	Seattle MSA	Statewide
Number of Employees, minus restaurants	8,157	142,048	181,234	398,324
Industry Mix by Area, County, Region and State	13.38%	12.08%	12.47%	13.00%

The summary business data also demonstrates how North King County retailers are similar to King County averages in terms of jobs per business (11.3 and 12.4) and revenues per business ($1.8 million versus $2.0 million). This further supports the above observation that North King County retailers are generally doing well meeting local, and in some cases, regional needs.

Retail and Wholesale Continued…

Summary Table: Retail (Except Restaurants)

	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodin-ville	North County	King County	Seattle MSA	State
Number of businesses	194	73	37	240	181	725	11,458	15,139	37,255
Number of employees	1,861	632	337	3,327	2,000	8,157	142,048	181,234	398,594
Annual revenues	**$340.9**	**$104.4**	**$38.5**	**$515.4**	**$298.0**	**$1,297**	**$23,266**	**$28,901**	**$64,616**
Jobs per business	9.6	8.7	9.1	13.9	11.0	11.3	12.4	12.0	10.7
Revenues per business	$1.8	$1.4	$1.0	$2.1	$1.6	$1.8	$2.0	$1.9	$1.7

Lake Forest Park (18.8%) and Shoreline (17.7%) both have a much higher proportion of retail trade jobs than the statewide proportion of 13%. Kenmore's share (14.2%) is slightly higher and Bothell (9.6%) and Woodinville (12.1%) both have slightly lower shares of retail jobs compared to the state.

Retail Specialization

An index of retail specialization was developed, using location quotients. Every North King County city has at least one retail sub-sector that offers a particularly high level of specialization – attracting visits and capturing consumer spending from other cities as well as local residents. As the following table shows, Bothell specializes in home furniture/furnishings/equipment (which includes big box home electronics stores). The index is 2.48, meaning that the number of jobs in this sector is actually 248% greater than normal based on statewide patterns of jobs for this size of city. Woodinville's building materials/hardware store sector is 198% greater than average in concentration. Kenmore, Lake Forest Park and Shoreline each have multiple areas of specialization.

Retail categories that rank lower than average, and point to instances of net leakage (consumer spending being made outside the local area by local residents) include the traditional mall-related category of apparel, with an index of only .45 for North King County. Given the extensive selection of apparel at the Bellevue Square and Alderwood Mall retail clusters, it would be difficult to significantly raise this index. Auto dealers and gas stations were lower than average in all cities except Shoreline, which has a strong dealer presence along Highway 99, both in new and used vehicles. Overall, food stores (including grocery stores) were below average, but this regional index was driven by low rankings in Bothell and Woodinville (in the other three cities there was a heavier than average concentration of food store jobs). General Merchandise, which includes Costco, was strong only in Shoreline, which had an index of 2.35. All other North King County cities rated below average. General Merchandise is another category that directly competes with retail located in major regional mall districts such as in Bellevue and Lynnwood.

Indexes of Retail Specialization (Location Quotients)

Industry Sector	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North King County
Building Materials, Garden Supply and Mobile Homes	**1.12**	**0.95**	**0.77**	**1.66**	**1.98**	**1.50**
General Merchandise Stores	**0.03**	**0.84**	**0.09**	**2.35**	**0.74**	**1.00**
Food Stores	**0.45**	**1.21**	**3.52**	**1.36**	**0.49**	**0.88**
Automobile Dealers and Gas Service Stations	**0.43**	**0.84**	**0.19**	**1.2**	**0.54**	**0.72**
Apparel and Accessory Stores	**0.38**	**0.42**	**0.00**	**0.14**	**0.93**	**0.45**
Home Furniture, Furnishings and Equipment	**2.48**	**1.45**	**0.41**	**1.01**	**1.04**	**1.50**
Eating and Drinking Places	**0.86**	**1.42**	**1.44**	**1.18**	**1.07**	**1.08**
Miscellaneous Retail	**0.72**	**1.4**	**2.44**	**1.1**	**1.08**	**1.03**

Retail and Wholesale Continued…

Wholesale Sector

North King County has a level of specialization in the area of wholesale trade. The area over-indexes the state in the proportion of total jobs within this area. This activity is heavily concentrated in Bothell (9.4% of all jobs) and Woodinville (11.0% of total jobs), indicating these two cities have warehouse districts within their commercially zoned business areas.

Industry Share For Wholesale Trade

Business Description	North County	King County	Seattle MSA	Statewide
Number of Employees	5,182	57,890	69,437	166,315
Industry Mix by Area, County, Region and State	8.50%	4.92%	4.78%	5.43%

Wholesale operations include importing and exporting, lumber and building material supply that is not classified as "retail" because it is only available to the business customer, wine distributors, auto parts suppliers and auto wrecking yards.

Examples of major wholesalers within North King County include ADT Security, Brooks Sports, Matsushita Avionics and Radar Inc. (all in Bothell) and Advanced Fire Protection, Boise Cascade, Container Home Supply, Fitz Auto Parts and International Wine & Spirits (all in Woodinville). Each of these employers has at least 50 employees at their North King County facility.

North King County actually has larger wholesale companies, on average, than in King County, as can be seen in the summary table on the following page. The average North King County wholesaler made $2.9 million in sales, compared to $2.4 million for King County and $2.5 million statewide.

Summary Table: Wholesale Trade

	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodin-ville	North County	King County	Seattle MSA	State
Number of businesses	71	30	15	64	111	291	4,354	5,387	11,786
Number of employees	1,821	219	56	1,265	1,821	5,182	57,890	69,437	166,315
Annual revenues	**$278.5**	**$41.6**	**$10.4**	**$200.8**	**$307.0**	**$838**	**$10,243**	**$12,236**	**$29,779**
Jobs per business	25.6	7.3	3.7	19.8	16.4	17.8	13.3	12.9	14.1
Revenues per business	$3.9	$1.4	$0.7	$3.1	$2.8	$2.9	$2.4	$2.3	$2.5

**Note: Revenues are in millions*

Wholesale managers indicated the following were major challenges they faced in operating their businesses in North King County: (Quotes provided below)

- A tax issue. In Woodinville, businesses are leaving town because the rent is too high and they are moving north to places like Everett where the rent is lower. My sales to businesses have declined.
- Cost of doing business, taxes i.e. L & I, B&O and the whole works.
- Unable to compete with international competitors.

INDUSTRY PROFILE: Construction

Construction is another important industry category in North King County, offering relatively high wage jobs and business activity that supports other industries such as wholesale and retail (i.e. tools and building materials). The North King County region as a whole clearly over-indexes construction jobs: North King County has 47% more construction jobs than the statewide norm (147% of the state). The proportion of total jobs dedicated to construction in Woodinville in 149% of the statewide norm. It is 67% higher in Kenmore and 88% higher in Lake Forest Park.

Industry Share for Construction

Business Description	North County	King County	Seattle MSA	Statewide
Number of Employees	4,605	49,145	69,110	157,204
Industry Mix by Area, County, Region and State	7.55%	4.18%	4.75%	5.13%

The average North King County construction firm makes $1.5 million, only slightly below King County's average of $1.7 million. A total of 513 construction businesses operate in one of the five North King County cities, equivalent to 9.7% of King County's establishments.

Summary Table: Construction

	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodin-ville	North County	King County	Seattle MSA	State
Number of businesses	120	59	35	151	148	513	5,314	7,984	9,816
Number of employees	1,086	381	173	845	2,120	4,605	49,145	69,110	157,204
Annual revenues	**$179.1**	**$69.4**	**$31.4**	**$147.6**	**$344.4**	**$771.9**	**$9,083**	**$12,705**	**$29,046**
Jobs per business	9.1	6.5	4.9	5.6	14.3	9.0	9.2	8.7	16.0
Revenues per business	$1.5	$1.2	$0.9	$1.0	$2.3	$1.5	$1.7	$1.6	$3.0

**Note: Revenues are in millions*

Within the construction industry, the economic activity was heavily concentrated in the special trades, rather than among the general contractors. Overall, North King County has 182% of the statewide normal amount of jobs in special trades, while it has only 102% for jobs within general building contractors and 110% for jobs working within general heavy construction contractors.

Economic development is a multi-pronged effort to launch a region toward planning for and creating a livable and sustainable community. Construction employers are sending a universal message to elected officials and the five city's staffs in the North King County Area. To do their job well they need to have fewer restrictions and they need local officials to streamline the development process and keep it affordable.

North King County has a lower proportion of public sector and infrastructure related jobs when compared with the state. However, due to the large share of government workers in Olympia, the county and MSA level is really more appropriate for comparisons. North King County is quite close to the overall King County share of public sector jobs, at 3.62% versus 3.78%.

Industry Share for Public Sector

Business Description	North County	King County	Seattle MSA	Statewide
Number of Employees	2,208	44,484	69,652	207,574
Industry Mix by Area, County, Region and State	3.62%	3.78%	4.79%	6.78%

The infrastructure-related industries of transportation, communications and utilities, on the other hand, are clearly not well-represented as a group compared to King County levels (2.43% versus 6.46% of total jobs). This means that local businesses often need to rely on transportation services and utilities that are based outside of the area, which may have negative effects on responsiveness, quality and accessibility.

Industry Share for Transportation/Communication/Utilities

Business Description	North County	King County	Seattle MSA	Statewide
Number of Employees	1,483	75,956	85,903	160,746
Industry Mix by Area, County, Region and State	2.43%	6.46%	5.91%	5.25%

Infrastructure/Public Sector Continued…

Government-related employers in North King County are slightly smaller in jobs per establishment than in King County, but larger than the statewide average. However, within the transportation/communications/utilities industry group, North King County businesses were around one-half the size in terms of jobs per employer and revenues per business.

Summary Table: Public Sector

	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodin-ville	North County	King County	Seattle MSA	State
Number of employers	29	6	4	29	9	77	1,425	1,928	9,011
Number of employees	764	167	44	1,154	79	2,208	44,484	69,652	207,574
Jobs per employer	26.3	27.8	11.0	39.8	8.8	28.7	31.2	36.1	23.0

Summary Table: Transportation/Communication/Utilities

	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodin-ville	North County	King County	Seattle MSA	State
Number of businesses	26	15	9	39	24	113	2,768	3,474	9,128
Number of employees	523	152	60	429	319	1,483	75,956	85,903	160,746
Annual revenues	**$106.5**	**$13.6**	**$12.7**	**$33.4**	**$27.1**	**$193**	**$8,545**	**$9,591**	**$17,082**
Jobs per business	20.1	10.1	6.7	11.0	13.3	13.1	27.4	24.7	17.6
Revenues per business	$4.1	$0.9	$1.4	$0.9	$1.1	$1.7	$3.1	$2.8	$1.9

**Note: Revenues are in millions*

A closer look at the individual components of the transportation/communications/utilities industry group reveals that North King County still has some areas of specialization. The following table profiles the sub-sectors in which at least one city has an area of concentration or specialization (an index of 1.2 means there are 20% more jobs than normal given the size of the total economy).

As one of the largest seaplane based airlines in the country, Kenmore Air is a particularly competitive regional business, which explains Kenmore's high index of 2.15 for air transportation. Having local air transport immediately available within the North King County area can be a significant strategic advantage for employers who need to transport workers or special business guests quickly across the Puget Sound and between Seattle, the greater Bellingham/San Juan Island area and Vancouver B.C.

Indexes of Specialization (Location Quotients)

Industry Sub-Sector within Transportation/Communications/ Utilities	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville
Local, Suburban and Interurban Transportation	0.00	0.00	0.00	**1.26**	0.91
U.S. Postal Service	0.25	0.25	0.42	**2.08**	**1.26**
Transportation by Air	0.27	**2.15**	0.00	0.01	0.20
Transportation Services	0.33	0.62	**4.06**	0.5	0.36
Electric, Gas and Sanitary Services	**1.82**	1.04	**1.48**	0.18	0.10

Population Growth Trends

Counting those who lived within the city boundaries before annexation, the North King County cities grew by 12,343 in population between 1990 and 2000, and another 787 persons over the last 4 years. These 5 cities currently represent a combined population of 125,525 (2004), which is equivalent to 7.0% of King County's 1.79 million population, 5% of the Seattle MSA and 2.0% of the state population. The relationship between new population growth and new household growth points to a clear change in the character of housing development in this area since 1990. During the 1990's, as new single family homes as well as apartments and condo units were built, there were an average of 2.07 persons for every new household. Since 2000, the corresponding average was only 1.10 – indicating that recent growth has occurred mainly in multi-family housing.

Population Growth Since 1990

YEAR	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
1990	*24,185*	*15,734*	*12,835*	*52,109*	*7,532*	112,395
2000	30,084	18,678	12,871	53,296	9,809	124,738
2001	30,404	18,790	12,889	53,421	9,825	125,329
2002	30,754	19,180	12,860	53,250	9,830	125,874
2003	30,910	19,200	12,750	52,730	9,905	125,495
2004	30,930	19,170	12,770	52,740	9,915	125,525
Chg. '90-'00	**5,899**	**2,944**	**36**	**1,187**	**2,277**	**12,343**
Chg. '00-'04	**846**	**492**	**-101**	**-556**	**106**	**787**

Notes: 1) 1990 population based on Census 1990 population living within the current geographic city boundaries; all other years estimated by Washington State Office of Financial Management (April 1)
2) North King County definition includes Snohomish County segment of Bothell
Source: Office of Financial Management

The following table provides household growth estimates for each city and the North County area as a whole. Nearly 6,000 households were added during the 1990s, and over the past 4 years there were another 717 households added to the total.

Household Growth Since 1990

YEAR	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
1990	*8,944*	*5,886*	*4,881*	*20,142*	*2,684*	*42,537*
2000	11,923	7,307	5,029	20,716	3,512	48,487
2001	12,127	7,379	5,039	20,735	3,541	48,820
2002	12,345	7,562	5,030	20,636	3,565	49,138
2003	12,486	7,600	4,988	20,399	3,616	49,089
2004	12,573	7,617	4,999	20,372	3,643	49,204
Chg. '90-'00	**2,979**	**1,421**	**148**	**574**	**828**	**5,950**
Chg. '00-'04	**650**	**310**	**-30**	**-344**	**131**	**717**

**Source: Claritas*

Nearly 2,000 of the total population within these cities do not live in households but instead reside in what are termed "group quarters housing." This category includes nursing homes as well as military quarters. All those living in apartments would be counted as households.

Population Living in Group Quarters (i.e. nursing homes)

YEAR	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
1990	*260*	*47*	*19*	*1,664*	*0*	*1,990*
2000	216	87	307	1,302	23	1,935
2001	218	89	311	1,300	23	1,941
2002	221	90	315	1,298	23	1,948
2003	223	92	319	1,297	23	1,954
2004	226	94	323	1,295	23	1,961
Chg. '90-'00	**-44**	**40**	**288**	**-362**	**23**	**-55**
Chg. '00-'04	**10**	**7**	**16**	**-7**	**0**	**26**

**Source: Claritas*

By subtracting group quarters populations from the total population, estimates of household population can be developed. While the total population is 125,525, there are currently an estimated 123,564 persons living in households (occupied housing units) within these 5 cities.

Population Living in Households (minus group quarters pop.)

YEAR	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
1990	*23,925*	*15,687*	*12,816*	*50,445*	*7,532*	*110,405*
2000	29,868	18,591	12,564	51,994	9,786	122,803
2001	30,186	18,701	12,578	52,121	9,802	123,388
2002	30,533	19,090	12,545	51,952	9,807	123,926
2003	30,687	19,108	12,431	51,433	9,882	123,541
2004	30,704	19,076	12,447	51,445	9,892	123,564
Chg. '90-'00	**5,943**	**2,904**	**-252**	**1,549**	**2,254**	**12,398**
Chg. '00-'04	**836**	**485**	**-117**	**-549**	**106**	**761**

**Source: Office of Financial Management and Claritas*

Average Household Size

The typical household living in the North King County cities is comprised of 2.51 persons, down slightly from 2.53 in 2000 and 2.60 in 1990. This pattern is similar to regional trends in lower household size related to demographic shifts in having fewer children, delaying age of marriage, and higher divorce rates. Woodinville showed the highest average household size of 2.72, while Bothell had the lowest average, at 2.44.

Average Household Size (persons per household)

YEAR	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
1990	*2.67*	*2.67*	*2.63*	*2.50*	*2.81*	*2.60*
2000	2.51	2.54	2.50	2.51	2.79	2.53
2001	2.49	2.53	2.50	2.51	2.77	2.53
2002	2.47	2.52	2.49	2.52	2.75	2.52
2003	2.46	2.51	2.49	2.52	2.73	2.52
2004	2.44	2.50	2.49	2.53	2.72	2.51
Chg. '90-'00	**-0.17**	**-0.12**	**-0.13**	**0.01**	**-0.02**	**-0.06**
Chg. '00-'04	**-0.06**	**-0.04**	**-0.01**	**0.02**	**-0.07**	**-0.02**

**Source: Office of Financial Management and Claritas*

Regional Comparisons (persons per household)

YEAR	North King County	King County	Seattle MSA	Statewide
1990	2.60	2.40	2.46	2.53
2000	2.53	2.39	2.46	2.53
2004	2.51	2.39	2.46	2.53

**Source: Office of Financial Management and Claritas*

Housing Unit Growth Trends

All together, the North King County cities increased their total inventory of housing from 50,233 in 2000 to 51,820 in 2004, a net gain of 1,587 units. Specifically, this involved an increase of 692 single family and 895 multi-family units.

Total Housing Units Since 1990

YEAR	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
1990	*9,257*	*6,149*	*4,957*	*20,645*	*2,857*	*43,865*
2000	12,265	7,562	5,168	21,338	3,900	50,233
2001	12,629	7,623	5,179	21,378	3,934	50,743
2002	12,837	7,728	5,184	21,440	3,918	51,107
2003	12,928	7,801	5,187	21,509	3,983	51,408
2004	13,003	7,961	5,192	21,641	4,023	51,820
Chg. '90-'00	**3,008**	**1,413**	**211**	**693**	**1,043**	**6,368**
Chg. '00-'04	**738**	**399**	**24**	**303**	**123**	**1,587**

Note: 1990 housing units based on Census 1990 units within the current geographic city boundaries; all other years estimated by Washington State Office of Financial Management (April 1)
Source: Office of Financial Management

Single Family Housing Units Since 2000

YEAR	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
2000	8,479	5,651	4,391	15,965	2,624	37,110
2001	8,499	5,661	4,402	15,991	2,658	37,211
2002	8,516	5,694	4,407	16,043	2,642	37,302
2003	8,521	5,753	4,412	16,095	2,707	37,488
2004	8,566	5,888	4,414	16,187	2,747	37,802
Chg. '00-'04	**87**	**237**	**23**	**222**	**123**	**692**

Source: Office of Financial Management

Multifamily Housing Units Since 2000

YEAR	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
2000	3,786	1,911	777	5,373	1,276	13,123
2001	4,130	1,962	777	5,387	1,276	13,532
2002	4,321	2,034	777	5,397	1,276	13,805
2003	4,407	2,048	775	5,414	1,276	13,920
2004	4,437	2,073	778	5,454	1,276	14,018
Chg. '00-'04	**651**	**162**	**1**	**81**	**0**	**895**

Source: Office of Financial Management

Multifamily Share of Housing

Approximately 27% of all housing units in the North King County cities have been multi-family housing (at least 2 units per structure). Bothell had the highest percentage, at 34.1%, while Lake Forest Park had the lowest share, at 15.0%. These levels have remained fairly constant since 2000. In comparison, 38.2% of King County housing is multi-family.

Percent of Units that are Multi-family

YEAR	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
2000	30.9%	25.3%	15.0%	25.2%	32.7%	26.1%
2001	32.7%	25.7%	15.0%	25.2%	32.4%	26.7%
2002	33.7%	26.3%	15.0%	25.2%	32.6%	27.0%
2003	34.1%	26.3%	14.9%	25.2%	32.0%	27.1%
2004	34.1%	26.0%	15.0%	25.2%	31.7%	27.1%

Source: Office of Financial Management

Percent Multi-family: County and State Comparisons

Year	North King County	King County	Washington
2000	26.1%	37.0%	25.6%
2001	26.7%	37.5%	25.7%
2002	27.0%	37.9%	25.8%
2003	27.1%	38.1%	25.8%
2004	27.1%	38.2%	25.8%

Source: Office of Financial Management

Household Income Trends

Average household incomes within the North King County cities rose by a total of 7.05% between 2000 and 2004, while median (one-half above, one-half below) incomes rose by 3.91%. The current median household income is $61,243 and the average is $75,305. Woodinville has the highest average, at $92,199, and Lake Forest Park has the highest median income, at $75,882.

Median Household Income since 1990

YEAR	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
1990	$40,547	$43,189	$46,141	$37,140	$44,891	$40,215
2000	$59,375	$62,586	$74,273	$51,957	$69,114	$58,940
2001	$59,897	$63,529	$74,672	$52,278	$70,328	$59,492
2002	$60,424	$64,486	$75,073	$52,602	$71,563	$60,072
2003	$60,955	$65,457	$75,477	$52,927	$72,820	$60,666
2004	$61,491	$66,443	$75,882	$53,254	$74,099	$61,243
2009	*$65,414*	*$71,595*	*$79,180*	*$55,818*	*$79,976*	*$65,036*

**Source: Claritas*

Average Household Income since 1990

YEAR	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
1990	$46,162	$50,832	$56,572	$44,138	$51,825	$47,402
2000	$66,383	$80,336	$86,639	$62,428	$86,398	$70,347
2001	$67,744	$81,980	$87,895	$63,271	$87,813	$71,531
2002	$69,132	$83,658	$89,170	$64,125	$89,251	$72,776
2003	$70,549	$85,370	$90,463	$64,991	$90,713	$74,043
2004	$71,995	$87,117	$91,775	$65,869	$92,199	$75,305
2009	*$77,817*	*$95,457*	*$97,196*	*$69,500*	*$99,859*	*$80,905*

**Source: Claritas*

Employment by Major Industry

The 60,986 jobs represented by the 5 North King County cities were broken down into 11 major industry categories. The single largest group is services, with 20,999 jobs. The smallest was non-profit and membership organizations, with 764 jobs. The following table provides an overview of employment for each city:

Number of Jobs by Major Industry Category

Business Description	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
All Industries	*19,410*	*4,439*	*1,789*	*18,757*	*16,591*	*60,986*
Manufacturing, except wineries	2,945	106	43	249	3,114	6,457
Construction	1,086	381	173	845	2,120	4,605
Retail, except restaurants	1,861	632	337	3,327	2,000	8,157
Tourism-related	1,237	418	161	1,458	2,310	5,584
Services, except hotels	7,155	1,988	659	8,007	3,190	20,999
Finance/insurance	1,307	166	157	1,090	495	3,215
Wholesale trade	1,821	219	56	1,265	1,821	5,182
Transportation/communications/utilities	523	152	60	429	319	1,483
Mining & agriculture	213	108	37	237	186	781
Non-profit/membership organizations	215	64	29	380	76	764
Public Sector	764	167	44	1,154	79	2,208

**Source: Claritas*

Explanation of "Tourism Related" Category

The tourism industry category was a special industry grouping that was created using specific industries within retail, services and manufacturing that are known to be related to visitor destinations or support services for visitors and guests. These industries include the following:

- Hotels
- Restaurants
- Museums, Art Galleries, Zoos, Etc.
- Wineries, breweries and other food manufacturers that may offer tours or be a tourist attraction

Employment classified as "tourism-related" was removed from the retail, services, and manufacturing totals to avoid double-counting of jobs.

North County Share of Regional Employment by Major Industry

Total employment within The 5 North King County cities is equal to 5.2% of King County jobs, 4.2% of regional jobs and 2% of statewide employment.

Total Employment by Area, County, Region and State

Business Description	North County	King County	Seattle MSA	Statewide
All Industries	*60,986*	*1,175,442*	*1,453,922*	*3,063,758*
Manufacturing, except wineries	6,457	121,877	165,602	283,292
Construction	4,605	49,145	69,110	157,204
Retail, except restaurants	8,157	142,048	181,234	398,324
Tourism-related	5,584	103,344	125,500	285,437
Services, except hotels	20,999	448,432	528,004	1,081,483
Finance/insurance	3,215	80,784	97,370	174,981
Wholesale trade	5,182	57,890	69,437	166,315
Transportation/communications/utilities	1,483	75,956	85,903	160,746
Agriculture & Mining	781	9,059	13,402	52,760
Non-profit/membership organizations	764	18,756	22,659	51,142
Public Sector	2,208	44,484	69,652	207,574

**Source: Claritas*

The North King County share of regional employment varies considerably by type of industry. For example, while the North County cities have 1.99% of statewide jobs overall, they represent 2.93% of the state's construction jobs and only 0.92% of the transportation and utilities jobs.

North County Share of King County, Region and State

Business Description	Share of King	Share of MSA	Share of State
All Industries	*5.19%*	*4.19%*	*1.99%*
Manufacturing, except wineries	5.30%	3.90%	2.28%
Construction	9.37%	6.66%	2.93%
Retail, except restaurants	5.74%	4.50%	2.05%
Tourism-related	5.40%	4.45%	1.96%
Services, except hotels	4.68%	3.98%	1.94%
Finance/insurance	3.98%	3.30%	1.84%
Wholesale trade	8.95%	7.46%	3.12%
Transportation/communications/utilities	1.95%	1.73%	0.92%
Mining & agriculture	8.62%	5.83%	1.48%
Non-profit/membership organizations	4.07%	3.37%	1.49%
Public Sector	4.96%	3.17%	1.06%

**Source: Claritas*

Industry Mix – North King County Cities

The industry mix of employment is shown in the following table, and the top 3 categories in each city were listed below, in order of their percentage share of total city jobs. Tourism ranks within the top 3 major industries in Woodinville (13.9%), Kenmore (9.4%) and Shoreline (7.8%).

Percent of City Employment in Each Industry Category (Industry Mix)

Business Description	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
All Industries	*100.00%*	*100.00%*	*100.00%*	*100.00%*	*100.00%*	*100.00%*
Manufacturing, except wineries	15.17%	2.39%	2.40%	1.33%	18.77%	10.59%
Construction	5.60%	8.58%	9.67%	4.50%	12.78%	7.55%
Retail, except restaurants	9.59%	14.24%	18.84%	17.74%	12.05%	13.38%
Tourism-related	6.37%	9.42%	9.00%	7.77%	13.92%	9.16%
Services, except hotels	36.86%	44.78%	36.84%	42.69%	19.23%	34.43%
Finance/insurance	6.73%	3.74%	8.78%	5.81%	2.98%	5.27%
Wholesale trade	9.38%	4.93%	3.13%	6.74%	10.98%	8.50%
Transportation/communications/utilities	2.69%	3.42%	3.35%	2.29%	1.92%	2.43%
Mining & agriculture	1.10%	2.43%	2.07%	1.26%	1.12%	1.28%
Non-profit/membership organizations	1.11%	1.44%	1.62%	2.03%	0.46%	1.25%
Public Sector	3.94%	3.76%	2.46%	6.15%	0.48%	3.62%

**Source: Claritas*

Top 3 Industries in Percentage of Total City Employment

Bothell

- 1. Services (36.9%)
- 2. Manufacturing (15.2%)
- 3. Retail (9.6%)

Kenmore

- 1. Services (44.8%)
- 2. Retail (14.2%)
- 3. Tourism (9.4%)

Lake Forest Park

- 1. Services (36.8%)
- 2. Retail (18.8%)
- 3. Construction (9.7%)

Shoreline

- 1. Services (42.7%)
- 2. Retail (17.7%)
- 3. Tourism (7.8%)

Woodinville

- 1. Services (19.2%)
- 2. Manufacturing (18.8%)
- 3. Tourism (13.9%)

Industry Mix – Area Comparisons

When comparisons are made between the combined industry mix of the North King County cities and regional or statewide patterns, it is evident that the North County cities are more concentrated in construction and wholesale trade jobs, while having a much smaller percentage in the transportation/communications/utilities industry. In all other industry categories, the area mix is similar to typical regional patterns.

Industry Mix by Area, County, Region and State

Business Description	North County	King County	Seattle MSA	Statewide
All Industries	*100.00%*	*100.00%*	*100.00%*	*100.00%*
Manufacturing, except wineries	10.59%	10.37%	11.39%	9.25%
Construction	7.55%	4.18%	4.75%	5.13%
Retail, except restaurants	13.38%	12.08%	12.47%	13.00%
Tourism-related	9.16%	8.79%	8.63%	9.32%
Services, except hotels	34.43%	38.15%	36.32%	35.30%
Finance/insurance	5.27%	6.87%	6.70%	5.71%
Wholesale trade	8.50%	4.92%	4.78%	5.43%
Transportation/communications/utilities	2.43%	6.46%	5.91%	5.25%
Mining & agriculture	1.28%	0.77%	0.92%	1.72%
Non-profit/membership organizations	1.25%	1.60%	1.56%	1.67%
Public Sector	3.62%	3.78%	4.79%	6.78%

**Source: Claritas*

Economic Specialization Analysis - Background

An analysis using location quotients was used to provide an indication of the areas of economic specialization or concentration within each North King County city.

Location quotients are measures of industrial specialization that compare the share of total employment of particular industrial groupings in a given city or county to the share it represents within the state. An industry quotient is determined by dividing that sector's share of city employment by its share of state employment. A quotient of 1.0 denotes an industry that is typical to the state as a whole. A value above 1.0 indicates an industrial specialization. A value below 1.0 marks an underrepresented industry.

Location quotients are often used as indicators of the extent that an area's production is being consumed locally or sold to non-local markets. The location quotient approach assists in identifying an area's export sectors. This notion contends that a regional economy depends upon the vigor of its export industries. Other economic sectors in the region support these export-oriented industries by providing needed supplies and services. The growth of export industries stimulates the expansion of supporting suppliers.

The method also indicates which sectors are not meeting local needs. When needs are not being met, residents and businesses need to import additional goods and services to meet production or consumption requirements. In this analysis, areas of particularly economic specialization are indicated by a value of at least 1.20. The higher value is used to allow for data imperfections. A value of less than .80, again allowing for data imperfections, indicates the need to import goods or services from outside the community.

Economic Specialization Analysis – by Major Industry

The following table shows the location quotients (i.e. indexes of industry specialization) for each major industry within each city and for the North King County cities as a whole. All industries that show at least a 1.20 level of specialization (20% or more above "normal" statewide levels for a city of that size) the index is bolded for easy reference. Following the table is a listing of the key industries within each city where the level of specialization is at least 1.20. Although several cities have many tourism-related workers, Woodinville was the only city where the tourism quotient was at least 1.20.

Business Description	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville	North County
Manufacturing, except wineries	**1.64**	0.26	0.26	0.14	**2.03**	**1.15**
Construction	1.09	**1.67**	**1.88**	0.88	**2.49**	**1.47**
Retail, except restaurants	0.74	1.10	**1.45**	**1.36**	0.93	1.03
Tourism-related	0.68	1.01	0.97	0.83	**1.49**	0.98
Services, except hotels	1.04	**1.27**	1.04	**1.21**	0.54	0.98
Finance/insurance	1.18	0.65	**1.54**	1.02	0.52	0.92
Wholesale trade	**1.73**	0.91	0.58	**1.24**	**2.02**	**1.57**
Transportation/communications/utilities	0.51	0.65	0.64	0.44	0.37	0.46
Mining & agriculture	0.64	**1.41**	**1.20**	0.73	0.65	0.74
Non-profit/membership organizations	0.66	0.86	0.97	**1.21**	0.27	0.75
Public Sector	0.58	0.56	0.36	0.91	0.07	0.53

Major Industries with Specialization/Clustering of Jobs

Bothell
- Wholesale (1.73)
- Manufacturing (1.64)

Kenmore
- Construction (1.67)
- Mining & agriculture (1.41)
- Services, except hotels (1.27)

Lake Forest Park
- Construction (1.88)
- Finance (1.54)
- Retail (1.45)
- Mining & agriculture (1.20)

Shoreline
- Retail (1.36)
- Wholesale (1.24)
- Services (1.21)
- Non-profits (1.21)

Woodinville
- Construction (2.49)
- Manufacturing (2.03)
- Wholesale (2.02)
- Tourism-related (1.49)

Economic Specialization Analysis – Bothell

The City of Bothell had 16 specific areas of economic specialization, representing 10,168 jobs, or 52.4% of the 19,410 total city employments. The most dominant industry sectors in terms of the index scores included chemical manufacturing, manufacturing instruments and manufacturing electrical and electronic equipment. Oil and gas extraction had a high index score but only represented 22 jobs, due to the extremely small industry size within Washington State.

Industry Sector	Index	Jobs
Manufacturing Chemicals and Allied Products	15.05	601
Oil and Gas Extraction	9.87	22
Manufacturing Measuring and Analyzing Instruments	6.28	612
Manufacturing Electrical and Electronic Equipment (Except Computers)	5.23	533
Eng, Acct, Research and Mgmt Related Services	3.66	1,952
Printing, Publishing and Allied Industries	3.27	650
Wholesale Trade-Durable Goods	2.91	1,725
Retail - Home Furniture, Furnishings and Equipment	2.48	651
Manufacturing Primary Metal Industries	2.18	98
Manufacturing Mining Nonmetallic, Except Fuels	1.83	15
Electric, Gas and Sanitary Services	1.82	200
Insurance Agents, Brokers and Service	1.70	356
Real Estate	1.59	646
Business Services (including software)	1.41	1,307
Construction-Special Trade Contractors	1.39	769
Manufacturing Apparel and Other Fabric Products	1.32	31
Jobs within Key Sectors	**na**	**10,168**

Economic Specialization Analysis – Kenmore

The City of Kenmore had 15 specific areas of economic specialization, representing 2,893 jobs, or 65.2% of the 4,439 total city employment. The most dominant industry sectors included amusement/recreation, miscellaneous repair services, and agricultural services. Manufacturing textile mill products had a high index but were based on only 4 jobs (small industry size statewide).

Industry Sector	Index	Jobs
Amusement and Recreational Service (Ex. Movies)	7.90	739
Miscellaneous Repair Services	2.26	33
Transportation by Air	2.15	90
Agricultural Services	2.10	85
Textile Mill Products	2.06	4
Building Construction and General Contractors	1.82	130
Construction-Special Trade Contractors	1.72	218
Lumber and Wood Products, Except Furniture	1.56	60
Automobile Repair, Services and Parking	1.54	83
Home Furniture,Furnishings and Equipment	1.45	87
Eating and Drinking Places	1.42	396
Miscellaneous Retail	1.40	171
Educational Services	1.35	474
Wholesale Trade-Durable Goods	1.29	175
Food Stores	1.21	148
Jobs within Key Sectors	**na**	**2893**

Economic Specialization Analysis – Lake Forest Park

Lake Forest Park had 18 specific areas of economic specialization, representing 1,139 jobs, or 63.7% of the 1,789 total city employment. The most dominant industry sectors included video rental stores, miscellaneous repair services, transportation services and food stores.

Industry Sector	Index	Jobs
Video Rental Stores (Motion Pictures industry)	5.40	22
Miscellaneous Repair Services	4.76	28
Transportation Services	4.06	34
Food Stores	3.52	174
Manufacturing Apparel and Other Fabric Products	3.23	7
Amusement and Recreational Service (Ex. Movies)	2.81	106
Real Estate	2.49	93
Miscellaneous Retail	2.44	120
Construction-Special Trade Contractors	2.37	121
Security and Commodity Brokers and Service	2.27	18
Agricultural Services	2.27	37
Miscellaneous Services	2.07	4
Eng, Acct, Research and Mgmt Related Services	1.87	92
Building Construction and General Contractors	1.63	47
Electric, Gas and Sanitary Services	1.48	15
Eating and Drinking Places	1.44	161
Personal Services	1.37	37
Depository Institutions	1.23	23
Jobs within Key Sectors	**na**	**1139**

Economic Specialization Analysis – Shoreline

The City of Shoreline had 17 specific areas of economic specialization, representing 10,182 jobs, or 54.3% of the 18,757 total city employment. The most dominant industry sectors included museums and art galleries, general merchandise stores, the U.S. Postal Service and wholesale of durable goods. A total of 18 jobs are in mining, which is a small statewide industry.

Industry Sector	Index	Jobs
Museums, Art Galleries, Zoos, Etc.	3.02	53
General Merchandise Stores	2.35	804
Mining Nonmetallic, Except Fuels	2.27	18
U.S. Postal Service	2.08	105
Wholesale Trade-Durable Goods	1.93	1109
Automobile Repair, Services and Parking	1.86	425
Amusement and Recreational Service (Ex. Movies)	1.78	704
Building Materials, Garden Supply and Mobile Homes	1.66	518
Real Estate	1.60	628
Health Services	1.48	2770
Food Stores	1.36	703
Personal Services	1.28	361
Agricultural Services	1.26	216
Local, Suburban and Interurban Transportation	1.26	117
Social Services	1.25	806
Membership Organizations	1.21	380
Automobile Dealers and Gas Service Stations	1.20	465
Jobs within Key Sectors	**na**	**10182**

Economic Specialization Analysis – Woodinville

The City of Woodinville had 25 specific areas of economic specialization, representing 9,272 jobs, or 55.9% of the 16,591 total city employment. Half (12) of these 25 categories are in manufacturing, not counting wineries/breweries, which in this study we have classified as "tourism-related." The four most dominant industry sectors included manufacturing measuring instruments, manufacturing furniture, manufacturing apparel and fabrics, and the local wineries.

Industry Sector	Index	Jobs
Manufacturing Measuring and Analyzing Instruments	11.07	922
Manufacturing Furniture and Fixtures	8.88	207
Manufacturing Apparel and Other Fabric Products	7.46	150
Wineries and breweries (Manufacturing Food and Kindred Products)	5.19	1,187
Oil and Gas Extraction	3.67	7
Construction-Special Trade Contractors	3.13	1,479
Miscellaneous Manufacturing Industries	2.85	211
Manufacturing Industry and Commercial Machinery and Computers	2.57	366
Manufacturing Fabricated Metal Products	2.37	297
Manufacturing Primary Metal Industries	2.34	90
Manufacturing Electrical and Electronic Equipment(Ex. Computers)	2.25	196
Manufacturing Stone, Clay, Glass and Concrete Products	2.15	94
Manufacturing Chemicals and Allied Products	2.14	73
Wholesale Trade-Durable Goods	2.06	1,044
Retail - Building Materials, Garden Supply and Mobile Homes	1.98	547
Wholesale Trade-Nondurable Goods	1.98	777
Heavy Construction Contractors	1.84	204
Building Construction and General Contractors	1.64	437
Personal Services	1.50	375
Manufacturing Paper and Allied Products	1.44	150
Manufacturing Rubber and Miscellaneous Plastics Products	1.41	54
Printing, Publishing and Allied Industries	1.39	236
U.S. Postal Service	1.26	56
Motion Pictures	1.24	47
Miscellaneous Repair Services	1.21	66
Jobs within Key Sectors	**na**	**9272**

Summary of City Location Quotients by Specific Industry Sector

Industry Sector	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville
All Industries	1.00	1.00	1.00	1.00	1.00
All Manufacturing (SIC 20-39)	**1.43**	0.26	0.23	0.12	**2.44**
All Retailing (SIC 52-59)	0.78	**1.20**	**1.45**	**1.30**	0.97
Agricultural Production - Crops	0.00	0.84	0.00	0.00	0.10
Agricultural Production - Livestock	0.27	0.29	0.00	0.00	0.00
Agricultural Services	0.97	**2.10**	**2.27**	**1.26**	1.10
Forestry	0.00	0.26	0.00	0.00	0.00
Fishing, Hunting and Trapping	0.00	0.00	0.00	0.53	0.81
Metal Mining	0.00	0.00	0.00	0.00	0.00
Coal Mining	0.00	0.00	0.00	0.00	0.00
Oil and Gas Extraction	**9.87**	0.00	0.00	0.00	**3.67**
Mining Nonmetallic, Except Fuels	**1.83**	0.00	0.00	**2.27**	0.00
Building Construction and General Contractors	0.63	**1.82**	**1.63**	0.62	**1.64**
Heavy Construction, Except SIC 15	0.92	1.11	0.42	0.68	**1.84**
Construction-Special Trade Contractors	**1.39**	**1.72**	**2.37**	1.07	**3.13**
Food and Kindred Products	0.04	0.28	0.00	0.00	**5.19**
Tobacco Manufacturers	0.00	0.00	0.00	0.00	0.00
Textile Mill Products	0.00	**2.06**	0.00	0.00	0.00
Apparel and Other Fabric Products	**1.32**	0.00	**3.23**	0.00	**7.46**
Lumber and Wood Products, Except Furniture	0.12	**1.56**	0.19	0.00	0.45
Furniture and Fixtures	0.00	0.00	0.00	0.91	**8.88**
Paper and Allied Products	0.01	0.00	0.00	0.04	**1.44**
Printing, Publishing and Allied Industries	**3.27**	0.57	1.04	0.36	**1.39**
Chemicals and Allied Products	**15.05**	0.00	0.00	0.18	**2.14**
Petroleum Refining and Related Industries	0.00	0.00	0.00	0.00	0.00
Rubber and Miscellaneous Plastics Products	0.00	0.00	0.00	0.28	**1.41**
Leather and Leather Products	0.00	0.00	0.00	0.00	0.00
Stone, Clay, Glass and Concrete Products	0.00	0.00	0.00	0.00	**2.15**
Primary Metal Industries	**2.18**	0.00	0.00	0.00	**2.34**
Fabricated Metal Products	1.16	0.00	0.07	0.15	**2.37**
Industry and Commercial Machinery and Computers	0.81	0.24	0.00	0.28	**2.57**
Electrical and Electronic Equipment(Ex. Computers)	**5.23**	0.17	0.00	0.02	**2.25**
Transportation Equipment	0.12	0.00	0.00	0.12	0.01
Measuring and Analyzing Instruments	**6.28**	0.04	0.67	0.10	**11.07**
Miscellaneous Manufacturing Industries	0.50	0.10	0.88	0.04	**2.85**

Summary of City Location Quotients Continued…

Industry Sector	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville
Railroad Transportation	0.00	0.00	0.00	0.00	0.00
Local, Suburban and Interurban Transportation	0.00	0.00	0.00	**1.26**	0.91
Motor Freight Transportation and Warehouse	0.45	0.23	0.00	0.33	0.44
U.S. Postal Service	0.25	0.25	0.42	**2.08**	**1.26**
Water Transportation	0.65	0.64	0.00	0.20	0.32
Transportation by Air	0.27	**2.15**	0.00	0.01	0.20
Pipe Lines, Except Natural Gas	0.00	0.00	0.00	0.00	0.00
Transportation Services	0.33	0.62	**4.06**	0.50	0.36
Communication	0.49	0.00	0.56	0.32	0.09
Electric, Gas and Sanitary Services	**1.82**	1.04	**1.48**	0.18	0.10
Wholesale Trade-Durable Goods	**2.91**	**1.29**	0.99	**1.93**	**2.06**
Wholesale Trade-Nondurable Goods	0.21	0.42	0.05	0.35	**1.98**
Building Materials, Garden Supply and Mobile Homes	1.12	0.95	0.77	**1.66**	**1.98**
General Merchandise Stores	0.03	0.84	0.09	**2.35**	0.74
Food Stores	0.45	**1.21**	**3.52**	**1.36**	0.49
Automobile Dealers and Gas Service Stations	0.43	0.84	0.19	**1.20**	0.54
Apparel and Accessory Stores	0.38	0.42	0.00	0.14	0.93
Home Furniture, Furnishings and Equipment	**2.48**	**1.45**	0.41	1.01	1.04
Eating and Drinking Places	0.86	**1.42**	**1.44**	1.18	1.07
Miscellaneous Retail	0.72	**1.40**	**2.44**	1.10	1.08
Depository Institutions	0.67	0.69	**1.23**	0.82	0.72
No Depository Credit Institutions	0.99	0.80	1.00	0.29	0.62
Security and Commodity Brokers and Service	0.54	0.71	**2.27**	0.33	0.27
Insurance Carriers	0.00	0.12	0.00	0.17	0.35
Insurance Agents, Brokers and Service	**1.70**	0.46	0.62	1.04	0.47
Real Estate	**1.59**	0.81	**2.49**	**1.60**	0.54
Holding and Other Investment Offices	0.11	0.00	0.00	0.52	0.10
Hotels and Other Lodging Places	0.55	0.07	0.00	0.07	0.03
Personal Services	0.70	1.05	**1.37**	**1.28**	**1.50**
Business Services (including software)	**1.41**	0.75	0.96	1.00	0.99
Automobile Repair, Services and Parking	0.29	**1.54**	0.60	**1.86**	0.84
Miscellaneous Repair Services	0.82	**2.26**	**4.76**	1.18	**1.21**
Motion Pictures (including video rental stores)	0.79	0.89	**5.40**	0.98	**1.24**
Amusement and Recreational Service (Ex. Movies)	0.57	**7.90**	**2.81**	**1.78**	0.63
Health Services	0.57	0.33	0.41	**1.48**	0.25
Legal Services	0.21	0.19	0.12	0.25	0.18
Educational Services	0.98	**1.35**	1.09	1.13	0.28
Social Services	0.96	0.93	0.73	**1.25**	0.40
Museums, Art Galleries, Zoos, Etc.	0.44	0.00	0.00	**3.02**	0.00
Membership Organizations	0.66	0.86	0.97	**1.21**	0.27

Summary of City Location Quotients Continued…

Industry Sector	Bothell	Kenmore	Lake Forest Park	Shoreline	Woodinville
Eng, Acct, Research and Mgmt Related Services	**3.66**	1.03	**1.87**	0.36	1.05
Miscellaneous Services	0.05	0.21	**2.07**	0.54	0.50
Public Administration (SIC 90-97)	0.58	0.56	0.36	0.91	0.07
Non-Classifiable Establishments	1.00	0.59	1.27	1.16	3.66

North King County Location Quotients by Specific Industry Sectors

Industry Sector	North King County
All Industries	1.00
All Manufacturing (SIC 20-39)	**1.18**
All Retailing (SIC 52-59)	1.04
Agricultural Production - Crops	0.09
Agricultural Production - Livestock	0.11
Agricultural Services	**1.22**
Forestry	0.02
Fishing, Hunting and Trapping	0.38
Metal Mining	0.00
Coal Mining	0.00
Oil and Gas Extraction	**4.14**
Mining Nonmetallic, Except Fuels	**1.28**
Building Construction and General Contractors	1.02
Heavy Construction, Except SIC 15	1.10
Construction-Special Trade Contractors	**1.82**
Food and Kindred Products	**1.44**
Tobacco Manufacturers	0.00
Textile Mill Products	0.15
Apparel and Other Fabric Products	**2.54**
Lumber and Wood Products, Except Furniture	0.28
Furniture and Fixtures	**2.70**
Paper and Allied Products	0.41
Printing, Publishing and Allied Industries	**1.60**
Chemicals and Allied Products	**5.43**
Petroleum Refining and Related Industries	0.00
Rubber and Miscellaneous Plastics Products	0.47
Leather and Leather Products	0.00
Stone, Clay, Glass and Concrete Products	0.59
Primary Metal Industries	1.33
Fabricated Metal Products	1.06

North King County Location Quotients Continued…

Industry Sector	North King County
Industry and Commercial Machinery and Computers	1.06
Electrical and Electronic Equipment(Ex. Computers)	**2.29**
Transportation Equipment	0.08
Measuring and Analyzing Instruments	**5.06**
Miscellaneous Manufacturing Industries	0.98
Railroad Transportation	0.00
Local, Suburban and Interurban Transportation	0.64
Motor Freight Transportation and Warehouse	0.38
U.S. Postal Service	1.09
Water Transportation	0.40
Transportation by Air	0.30
Pipe Lines, Except Natural Gas	0.00
Transportation Services	0.52
Communication	0.30
Electric, Gas and Sanitary Services	0.78
Wholesale Trade-Durable Goods	**2.20**
Wholesale Trade-Nondurable Goods	0.74
Building Materials, Garden Supply and Mobile Homes	**1.50**
General Merchandise Stores	1.00
Food Stores	0.88
Automobile Dealers and Gas Service Stations	0.72
Apparel and Accessory Stores	0.45
Home Furniture, Furnishings and Equipment	**1.50**
Eating and Drinking Places	1.08
Miscellaneous Retail	1.03
Depository Institutions	0.75
No Depository Credit Institutions	0.66
Security and Commodity Brokers and Service	0.46
Insurance Carriers	0.15
Insurance Agents, Brokers and Service	1.04
Real Estate	**1.28**
Holding and Other Investment Offices	0.22
Hotels and Other Lodging Places	0.21
Personal Services	1.14
Business Services (including software)	1.11
Automobile Repair, Services and Parking	1.02
Miscellaneous Repair Services	**1.26**
Motion Pictures	1.12

North King County Location Quotients Continued…

Industry Sector	North King County
Amusement and Recreational Service (Ex. Movies)	**1.56**
Health Services	0.74
Legal Services	0.21
Educational Services	0.87
Social Services	0.89
Museums, Art Galleries, Zoos, Etc.	1.07
Membership Organizations	0.75
Eng, Acct, Research and Mgmt Related Services	**1.70**
Miscellaneous Services	0.40
Public Administration (SIC 90-97)	0.53
Non-Classifiable Establishments	1.75

Summary Business Data – Background Information

Source
The following tables provide sales, facility and employment data for the State of Washington, the Seattle-Bellevue-Everett MSA, King County and the cities of Bothell, Kenmore, Lake Forest Park, Shoreline and Woodinville for the calendar year of 2004. All data is in the 2-digit Standard Industrial Classification (SIC) level.

The data in these tables were provided by Claritas Inc., using the business database of InfoUSA.

The sources used provide accurate and in-depth information about employment figures and other statistics of publicly traded and privately held companies. Statistics on government employment are also taken into account based on available reports. InfoUSA maintains a comprehensive database of approximately 12 million U.S. firms, which it contacts on a regular basis to obtain current information on jobs and revenues. Government industry reports and public company financial reports are also used. The government reports are used to identify and contact new businesses that are not yet listed in a major phone directory.

Limitations
The business summary data may not match other published data on employment or number of business establishments due to differences in methodology, time of year updated, etc. The Claritas data was preferred over local and state government estimates mainly because 1) employment data as well as total gross business income data and business counts were provided by city, 2) the data was collected and processed in the same manner for each geographic level in the statistical profile, including King County, the Seattle MSA and the state; and 3) data was available at the 2-digit SIC code level for the examination of smaller industry segments.

Key Terms

Establishments
Establishments are the number of reporting businesses. The number of establishments does not correspond to the number of businesses. For example, a restaurant, for accounting purposes, may report sales to government for the restaurant and for a lounge. In this case, there would be two establishment reports, but in actuality, one business. Reports are submitted quarterly and the number of reporting businesses normally varies from quarter to quarter. The numbers reflected on these tables are based on an average of the last four reporting quarters.

Employees
Employees are the number of persons on the payroll at the time the report was prepared. The reported numbers represent annual averages.

Department Stores
Establishment's normally employing 25 people or more, having sales of apparel and soft goods combined amounting to 20 percent or more of total sales and selling each of the following lines of merchandise:

- Furniture, home furnishings, appliance, radio and TV sets
- A general line of apparel for the family
- Household linens and dry goods

The employment and lines of merchandise are both taken into account when classifying a department store. To qualify as a department store, sales of each of the lines listed above must be less than 80 percent of total store sales. An establishment with total sales of $10 million or more is classified as a department store even if sales of one of the merchandise lines listed above exceed the maximum percent of total sales, provided that the combined sales of the other two groups are $1 million or more. Very few stores are included in the department store classification as a result of this narrow definition. Most stores are classified in the apparel groups (SIC 56).

SIC
Data in these reports are shown by major industry according to the 1987 edition of the Standard Industrial Classification Manual, published by the federal office of Management and Budget. Firms are assigned to a SIC category based upon the description of their primary activity.

Summary Business Data – Bothell

	Bothell	Estab.	Employ.	Revenues
TOT	All Industries	1,321	19,410	2,207.8
MAN	All Manufacturing (SIC 20-39)	67	2,955	216.5
RET	All Retailing (SIC 52-59)	275	2,911	391.4
	Agriculture, Forestry and Fishing	**31**	**176**	**6.9**
1	Agricultural Production - Crops	0	0	0
2	Agricultural Production - Livestock	1	4	0.2
7	Agricultural Services	30	172	6.7
8	Forestry	0	0	0
9	Fishing, Hunting and Trapping	0	0	0
	Mining	**2**	**37**	**4.1**
10	Metal Mining	0	0	0
12	Coal Mining	0	0	0
13	Oil and Gas Extraction	1	22	2.4
14	Mining Nonmetallic, Except Fuels	1	15	1.7
	Construction	**120**	**1,086**	**179.1**
15	Building Construction and General Contractors	30	197	52.6
16	Heavy Construction, Except SIC 15	3	120	15.3
17	Construction-Special Trade Contractors	87	769	111.2
	Manufacturing	**67**	**2,955**	**216.5**
20	Food and Kindred Products	2	10	1
21	Tobacco Manufacturers	0	0	0
22	Textile Mill Products	0	0	0
23	Apparel and Other Fabric Products	1	31	2
24	Lumber and Wood Products, Except Furniture	2	20	1.8
25	Furniture and Fixtures	0	0	0
26	Paper and Allied Products	1	1	0.1
27	Printing, Publishing and Allied Industries	12	650	37.2
28	Chemicals and Allied Products	8	601	45.2
29	Petroleum Refining and Related Industries	0	0	0
30	Rubber and Miscellaneous Plastics Products	0	0	0
31	Leather and Leather Products	0	0	0
32	Stone, Clay, Glass and Concrete Products	0	0	0
33	Primary Metal Industries	2	98	6.6
34	Fabricated Metal Products	2	170	12.8
35	Industry and Commercial Machinery and Computers	7	134	13.2
36	Electrical and Electronic Equipment(Ex. Computers)	11	533	49.4
37	Transportation Equipment	2	52	2.5
38	Measuring and Analyzing Instruments	10	612	41.3
39	Miscellaneous Manufacturing Industries	7	43	3.4

Summary Business Data – Bothell Continued…

	Bothell	Estab.	Employ.	Revenues
	Transportation, Communication & Utilities	**26**	**523**	**106.5**
40	Railroad Transportation	0	0	0
41	Local, Suburban and Interurban Transportation	0	0	0
42	Motor Freight Transportation and Warehouse	9	113	18
43	U.S. Postal Service	2	13	0.6
44	Water Transportation	3	31	3.8
45	Transportation by Air	1	50	4.3
46	Pipe Lines, Except Natural Gas	0	0	0
47	Transportation Services	6	30	9.5
48	Communication	4	86	8.9
49	Electric, Gas and Sanitary Services	1	200	61.4
	Wholesale Trade	**71**	**1,821**	**278.5**
50	Wholesale Trade-Durable Goods	59	1,725	262.5
51	Wholesale Trade-Nondurable Goods	12	96	16
	Retail Trade	**275**	**2,911**	**391**
52	Building Materials, Garden Supply and Mobile Homes	10	363	47.5
53	General Merchandise Stores	7	12	1.2
54	Food Stores	20	239	40.2
55	Automobile Dealers and Gas Service Stations	19	171	43.9
56	Apparel and Accessory Stores	12	43	3
57	Home Furniture, Furnishings and Equipment	45	651	159.9
58	Eating and Drinking Places	81	1,050	50.1
59	Miscellaneous Retail	81	382	45.6
	Finance, Insurance & Real Estate	**149**	**1,476**	**263.2**
60	Depository Institutions	17	136	37.7
61	No Depository Credit Institutions	10	118	35
62	Security and Commodity Brokers and Service	10	46	7.7
63	Insurance Carriers	0	0	0
64	Insurance Agents, Brokers and Service	34	356	83.1
65	Real Estate	67	646	91.9
67	Holding and Other Investment Offices	2	5	1.3
	Services	**524**	**7,547**	**768.1**
70	Hotels and Other Lodging Places	9	169	6.5
72	Personal Services	68	205	9.9
73	Business Services (including software)	97	1,307	164
75	Automobile Repair, Services and Parking	12	69	4.8
76	Miscellaneous Repair Services	17	52	4.5
78	Motion Pictures	5	35	4.1
79	Amusement and Recreational Service (Ex. Movies)	30	234	18.3
80	Health Services	84	1,110	97.1
81	Legal Services	15	39	7.2

Summary Business Data – Bothell Continued…

	Bothell	Estab.	Employ.	Revenues
82	Educational Services	33	1,511	129.5
83	Social Services	34	640	28.4
84	Museums, Art Galleries, Zoos, Etc.	1	8	0.2
86	Membership Organizations	35	215	11.9
87	Eng, Acct, Research and Mgmt Related Services	83	1,952	281.6
89	Miscellaneous Services	1	1	0.1
90	**Public Administration (SIC 90-97)**	29	764	0
99	**Non-Classifiable Establishments**	36	283	0

Summary Business Data – Kenmore

	Kenmore	Estab.	Employ.	Revenues
TOT	All Industries	505	4,439	469.5
MAN	All Manufacturing (SIC 20-39)	19	123	10.1
RET	All Retailing (SIC 52-59)	97	1,028	123.6
	Agriculture, Forestry and Fishing	**16**	**108**	**5.6**
1	Agricultural Production - Crops	1	21	1.9
2	Agricultural Production - Livestock	1	1	0.1
7	Agricultural Services	13	85	3.5
8	Forestry	1	1	0.1
9	Fishing, Hunting and Trapping	0	0	0
	Mining	**0**	**0**	**0**
10	Metal Mining	0	0	0
12	Coal Mining	0	0	0
13	Oil and Gas Extraction	0	0	0
14	Mining Nonmetallic, Except Fuels	0	0	0
	Construction	**59**	**381**	**69.4**
15	Building Construction and General Contractors	28	130	35.6
16	Heavy Construction, Except SIC 15	3	33	4.3
17	Construction-Special Trade Contractors	28	218	29.5
	Manufacturing	**19**	**123**	**10.1**
20	Food and Kindred Products	1	17	1.6
21	Tobacco Manufacturers	0	0	0
22	Textile Mill Products	1	4	0.2
23	Apparel and Other Fabric Products	0	0	0
24	Lumber and Wood Products, Except Furniture	1	60	4.3
25	Furniture and Fixtures	0	0	0
26	Paper and Allied Products	0	0	0
27	Printing, Publishing and Allied Industries	8	26	2.6
28	Chemicals and Allied Products	0	0	0
29	Petroleum Refining and Related Industries	0	0	0
30	Rubber and Miscellaneous Plastics Products	0	0	0
31	Leather and Leather Products	0	0	0
32	Stone, Clay, Glass and Concrete Products	0	0	0
33	Primary Metal Industries	0	0	0
34	Fabricated Metal Products	0	0	0
35	Industry and Commercial Machinery and Computers	4	9	0.8
36	Electrical and Electronic Equipment(Ex. Computers)	2	4	0.3
37	Transportation Equipment	0	0	0
38	Measuring and Analyzing Instruments	1	1	0.1
39	Miscellaneous Manufacturing Industries	1	2	0.2

Summary Business Data – Kenmore Continued…

	Kenmore	Estab.	Employ.	Revenues
	Transportation, Communication & Utilities	**15**	**152**	**13.6**
40	Railroad Transportation	0	0	0
41	Local, Suburban and Interurban Transportation	0	0	0
42	Motor Freight Transportation and Warehouse	3	13	1.5
43	U.S. Postal Service	1	3	0.1
44	Water Transportation	4	7	1.2
45	Transportation by Air	1	90	4.4
46	Pipe Lines, Except Natural Gas	0	0	0
47	Transportation Services	3	13	4.1
48	Communication	0	0	0
49	Electric, Gas and Sanitary Services	3	26	2.3
	Wholesale Trade	**30**	**219**	**41.6**
50	Wholesale Trade-Durable Goods	22	175	34
51	Wholesale Trade-Nondurable Goods	8	44	7.6
	Retail Trade	**97**	**1028**	**124**
52	Building Materials, Garden Supply and Mobile Homes	10	70	9.9
53	General Merchandise Stores	2	68	7.5
54	Food Stores	7	148	25.1
55	Automobile Dealers and Gas Service Stations	12	77	16.8
56	Apparel and Accessory Stores	6	11	0.8
57	Home Furniture, Furnishings and Equipment	14	87	19.9
58	Eating and Drinking Places	24	396	19.6
59	Miscellaneous Retail	22	171	24
	Finance, Insurance & Real Estate	**42**	**171**	**35.9**
60	Depository Institutions	4	32	9.1
61	No Depository Credit Institutions	4	22	6.8
62	Security and Commodity Brokers and Service	3	14	2.2
63	Insurance Carriers	1	1	0.1
64	Insurance Agents, Brokers and Service	6	22	5.1
65	Real Estate	22	75	12.4
67	Holding and Other Investment Offices	0	0	0
	Services	**216**	**2057**	**169.9**
70	Hotels and Other Lodging Places	2	5	0.2
72	Personal Services	26	70	2.9
73	Business Services (including software)	26	158	24.2
75	Automobile Repair, Services and Parking	25	83	5.9
76	Miscellaneous Repair Services	11	33	3.5
78	Motion Pictures	2	9	0.7
79	Amusement and Recreational Service (Ex. Movies)	15	739	37.4
80	Health Services	30	145	12.9
81	Legal Services	3	8	1.5
82	Educational Services	9	474	47.6

Summary Business Data – Kenmore Continued…

	Kenmore	Estab.	Employ.	Revenues
83	Social Services	20	142	7.7
84	Museums, Art Galleries, Zoos, Etc.	0	0	0
86	Membership Organizations	13	64	5.7
87	Eng, Acct, Research and Mgmt Related Services	33	126	19.6
89	Miscellaneous Services	1	1	0.1
90	**Public Administration (SIC 90-97)**	6	167	0
99	**Non-Classifiable Establishments**	7	38	0

Summary Business Data – Lake Forest Park

	Lake Forest Park	Estab.	Employ.	Revenues
TOT	All Industries	298	1,789	202.7
MAN	All Manufacturing (SIC 20-39)	8	43	2.8
RET	All Retailing (SIC 52-59)	49	498	46.4
	Agriculture, Forestry and Fishing	**10**	**37**	**1.6**
1	Agricultural Production - Crops	0	0	0
2	Agricultural Production - Livestock	0	0	0
7	Agricultural Services	10	37	1.6
8	Forestry	0	0	0
9	Fishing, Hunting and Trapping	0	0	0
	Mining	**0**	**0**	**0**
10	Metal Mining	0	0	0
12	Coal Mining	0	0	0
13	Oil and Gas Extraction	0	0	0
14	Mining Nonmetallic, Except Fuels	0	0	0
	Construction	**35**	**173**	**31.4**
15	Building Construction and General Contractors	9	47	12.7
16	Heavy Construction, Except SIC 15	1	5	0.6
17	Construction-Special Trade Contractors	25	121	18.1
	Manufacturing	**8**	**43**	**2.8**
20	Food and Kindred Products	0	0	0
21	Tobacco Manufacturers	0	0	0
22	Textile Mill Products	0	0	0
23	Apparel and Other Fabric Products	1	7	0.5
24	Lumber and Wood Products, Except Furniture	1	3	0.2
25	Furniture and Fixtures	0	0	0
26	Paper and Allied Products	0	0	0
27	Printing, Publishing and Allied Industries	3	19	1.2
28	Chemicals and Allied Products	0	0	0
29	Petroleum Refining and Related Industries	0	0	0
30	Rubber and Miscellaneous Plastics Products	0	0	0
31	Leather and Leather Products	0	0	0
32	Stone, Clay, Glass and Concrete Products	0	0	0
33	Primary Metal Industries	0	0	0
34	Fabricated Metal Products	1	1	0.1
35	Industry and Commercial Machinery and Computers	0	0	0
36	Electrical and Electronic Equipment(Ex. Computers)	0	0	0
37	Transportation Equipment	0	0	0
38	Measuring and Analyzing Instruments	1	6	0.4
39	Miscellaneous Manufacturing Industries	1	7	0.4

Summary Business Data – Lake Forest Park Continued…

	Lake Forest Park	Estab.	Employ.	Revenues
	Transportation, Communication & Utilities	**9**	**60**	**12.7**
40	Railroad Transportation	0	0	0
41	Local, Suburban and Interurban Transportation	0	0	0
42	Motor Freight Transportation and Warehouse	0	0	0
43	U.S. Postal Service	1	2	0.1
44	Water Transportation	0	0	0
45	Transportation by Air	0	0	0
46	Pipe Lines, Except Natural Gas	0	0	0
47	Transportation Services	6	34	10.5
48	Communication	1	9	0.9
49	Electric, Gas and Sanitary Services	1	15	1.2
	Wholesale Trade	**15**	**56**	**10.4**
50	Wholesale Trade-Durable Goods	14	54	9.9
51	Wholesale Trade-Nondurable Goods	1	2	0.5
	Retail Trade	**49**	**498**	**46**
52	Building Materials, Garden Supply and Mobile Homes	3	23	3.3
53	General Merchandise Stores	1	3	0.3
54	Food Stores	10	174	22.9
55	Automobile Dealers and Gas Service Stations	2	7	1.3
56	Apparel and Accessory Stores	0	0	0
57	Home Furniture, Furnishings and Equipment	5	10	1.5
58	Eating and Drinking Places	12	161	7.5
59	Miscellaneous Retail	16	120	9.6
	Finance, Insurance & Real Estate	**28**	**157**	**26.5**
60	Depository Institutions	3	23	6.1
61	No Depository Credit Institutions	2	11	3.4
62	Security and Commodity Brokers and Service	5	18	2.8
63	Insurance Carriers	0	0	0
64	Insurance Agents, Brokers and Service	6	12	2.8
65	Real Estate	12	93	11.4
67	Holding and Other Investment Offices	0	0	0
	Services	**132**	**688**	**70.9**
70	Hotels and Other Lodging Places	0	0	0
72	Personal Services	12	37	1.8
73	Business Services (including software)	26	82	10.7
75	Automobile Repair, Services and Parking	3	13	0.8
76	Miscellaneous Repair Services	6	28	2.1
78	Motion Pictures	5	22	3.3
79	Amusement and Recreational Service (Ex. Movies)	12	106	8
80	Health Services	13	74	7.6
81	Legal Services	1	2	0.4
82	Educational Services	10	154	19

Summary Business Data – Lake Forest Park Continued…

	Lake Forest Park	Estab.	Employ.	Revenues
83	Social Services	12	45	3.3
84	Museums, Art Galleries, Zoos, Etc.	0	0	0
86	Membership Organizations	5	29	1.3
87	Eng, Acct, Research and Mgmt Related Services	25	92	12.3
89	Miscellaneous Services	2	4	0.3
90	**Public Administration (SIC 90-97)**	4	44	0
99	**Non-Classifiable Establishments**	8	33	0

Summary Business Data – Shoreline

	Shoreline	Estab.	Employ.	Revenues
TOT	All Industries	1,599	18,757	1,886.30
MAN	All Manufacturing (SIC 20-39)	38	249	20.9
RET	All Retailing (SIC 52-59)	319	4,711	584
	Agriculture, Forestry and Fishing	**41**	**219**	**9.3**
1	Agricultural Production - Crops	0	0	0
2	Agricultural Production - Livestock	0	0	0
7	Agricultural Services	39	216	9
8	Forestry	0	0	0
9	Fishing, Hunting and Trapping	2	3	0.3
	Mining	**1**	**18**	**2.1**
10	Metal Mining	0	0	0
12	Coal Mining	0	0	0
13	Oil and Gas Extraction	0	0	0
14	Mining Nonmetallic, Except Fuels	1	18	2.1
	Construction	**151**	**845**	**147.6**
15	Building Construction and General Contractors	41	186	50.5
16	Heavy Construction, Except SIC 15	9	86	10.3
17	Construction-Special Trade Contractors	101	573	86.8
	Manufacturing	**38**	**249**	**20.9**
20	Food and Kindred Products	0	0	0
21	Tobacco Manufacturers	0	0	0
22	Textile Mill Products	0	0	0
23	Apparel and Other Fabric Products	0	0	0
24	Lumber and Wood Products, Except Furniture	0	0	0
25	Furniture and Fixtures	1	24	1.6
26	Paper and Allied Products	1	5	0.3
27	Printing, Publishing and Allied Industries	15	69	5
28	Chemicals and Allied Products	2	7	0.8
29	Petroleum Refining and Related Industries	0	0	0
30	Rubber and Miscellaneous Plastics Products	3	12	0.8
31	Leather and Leather Products	0	0	0
32	Stone, Clay, Glass and Concrete Products	0	0	0
33	Primary Metal Industries	0	0	0
34	Fabricated Metal Products	3	21	1.5
35	Industry and Commercial Machinery and Computers	4	45	4.7
36	Electrical and Electronic Equipment(Ex. Computers)	2	2	0.2
37	Transportation Equipment	4	52	5
38	Measuring and Analyzing Instruments	1	9	0.7
39	Miscellaneous Manufacturing Industries	2	3	0.3

Summary Business Data – Shoreline Continued…

	Shoreline	Estab.	Employ.	Revenues
	Transportation, Communication & Utilities	**39**	**429**	**33.4**
40	Railroad Transportation	0	0	0
41	Local, Suburban and Interurban Transportation	6	117	4.7
42	Motor Freight Transportation and Warehouse	11	79	7.8
43	U.S. Postal Service	1	105	0.5
44	Water Transportation	4	9	1
45	Transportation by Air	1	1	0.1
46	Pipe Lines, Except Natural Gas	0	0	0
47	Transportation Services	12	44	14
48	Communication	3	55	3.8
49	Electric, Gas and Sanitary Services	1	19	1.5
	Wholesale Trade	**64**	**1265**	**200.8**
50	Wholesale Trade-Durable Goods	43	1,109	171.5
51	Wholesale Trade-Nondurable Goods	21	156	29.3
	Retail Trade	**319**	**4711**	**584**
52	Building Materials, Garden Supply and Mobile Homes	19	518	69.9
53	General Merchandise Stores	12	804	88.8
54	Food Stores	41	703	119
55	Automobile Dealers and Gas Service Stations	46	465	122.9
56	Apparel and Accessory Stores	8	15	1.8
57	Home Furniture, Furnishings and Equipment	30	257	51
58	Eating and Drinking Places	79	1,384	68.6
59	Miscellaneous Retail	84	565	62
	Finance, Insurance & Real Estate	**149**	**1111**	**199.4**
60	Depository Institutions	18	162	41.3
61	No Depository Credit Institutions	9	34	9.7
62	Security and Commodity Brokers and Service	8	27	4.5
63	Insurance Carriers	1	6	0.7
64	Insurance Agents, Brokers and Service	32	209	48.7
65	Real Estate	69	628	88
67	Holding and Other Investment Offices	5	24	5.3
	Services	**737**	**8461**	**690.0**
70	Hotels and Other Lodging Places	7	21	1.2
72	Personal Services	99	361	16.8
73	Business Services (including software)	105	898	88.7
75	Automobile Repair, Services and Parking	44	425	62.3
76	Miscellaneous Repair Services	20	73	7.6
78	Motion Pictures	5	42	2.7
79	Amusement and Recreational Service (Ex. Movies)	42	704	41.6
80	Health Services	132	2,770	174.1
81	Legal Services	19	45	8.5

Summary Business Data – Shoreline Continued…

	Shoreline	Estab.	Employ.	Revenues
82	Educational Services	45	1,685	174.8
83	Social Services	69	806	58.3
84	Museums, Art Galleries, Zoos, Etc.	3	53	1.3
86	Membership Organizations	79	380	27.1
87	Eng, Acct, Research and Mgmt Related Services	62	187	24.2
89	Miscellaneous Services	6	11	0.8
90	**Public Administration (SIC 90-97)**	29	1,154	0
99	**Non-Classifiable Establishments**	38	316	0

Summary Business Data – Woodinville

	Woodinville	Estab.	Employ.	Revenues
TOT	All Industries	1,237	16,591	1,820.6
MAN	All Manufacturing (SIC 20-39)	143	4,301	346
RET	All Retailing (SIC 52-59)	248	3,114	352.7
	Agriculture, Forestry and Fishing	**33**	**179**	**7.4**
1	Agricultural Production - Crops	1	9	0.8
2	Agricultural Production - Livestock	0	0	0
7	Agricultural Services	31	166	6.2
8	Forestry	0	0	0
9	Fishing, Hunting and Trapping	1	4	0.4
	Mining	**1**	**7**	**1.1**
10	Metal Mining	0	0	0
12	Coal Mining	0	0	0
13	Oil and Gas Extraction	1	7	1.1
14	Mining Nonmetallic, Except Fuels	0	0	0
	Construction	**148**	**2120**	**344.4**
15	Building Construction and General Contractors	54	437	118.7
16	Heavy Construction, Except SIC 15	2	204	21.6
17	Construction-Special Trade Contractors	92	1,479	204.1
	Manufacturing	**143**	**4301**	**346**
20	Food and Kindred Products	21	1,187	103.1
21	Tobacco Manufacturers	0	0	0
22	Textile Mill Products	0	0	0
23	Apparel and Other Fabric Products	3	150	9.6
24	Lumber and Wood Products, Except Furniture	5	65	9.5
25	Furniture and Fixtures	6	207	14.4
26	Paper and Allied Products	3	150	9.7
27	Printing, Publishing and Allied Industries	22	236	14.6
28	Chemicals and Allied Products	3	73	5.5
29	Petroleum Refining and Related Industries	0	0	0
30	Rubber and Miscellaneous Plastics Products	3	54	4.1
31	Leather and Leather Products	0	0	0
32	Stone, Clay, Glass and Concrete Products	4	94	3.2
33	Primary Metal Industries	2	90	11.8
34	Fabricated Metal Products	21	297	29.4
35	Industry and Commercial Machinery and Computers	16	366	38.2
36	Electrical and Electronic Equipment(Ex. Computers)	8	196	14.2
37	Transportation Equipment	1	3	0.5
38	Measuring and Analyzing Instruments	11	922	61.6
39	Miscellaneous Manufacturing Industries	14	211	16.6

Summary Business Data – Woodinville Continued…

	Woodinville	Estab.	Employ.	Revenues
	Transportation, Communication & Utilities	**24**	**319**	**27.1**
40	Railroad Transportation	0	0	0
41	Local, Suburban and Interurban Transportation	3	75	3.2
42	Motor Freight Transportation and Warehouse	7	93	10.6
43	U.S. Postal Service	1	56	0.3
44	Water Transportation	4	13	1.6
45	Transportation by Air	2	32	2.9
46	Pipe Lines, Except Natural Gas	0	0	0
47	Transportation Services	4	28	6.3
48	Communication	2	13	1.5
49	Electric, Gas and Sanitary Services	1	9	0.7
	Wholesale Trade	**111**	**1821**	**307**
50	Wholesale Trade-Durable Goods	90	1,044	198.1
51	Wholesale Trade-Nondurable Goods	21	777	108.9
	Retail Trade	**248**	**3114**	**353**
52	Building Materials, Garden Supply and Mobile Homes	27	547	86.1
53	General Merchandise Stores	2	224	24.9
54	Food Stores	16	227	39
55	Automobile Dealers and Gas Service Stations	24	184	46.4
56	Apparel and Accessory Stores	11	91	6
57	Home Furniture, Furnishings and Equipment	33	234	44.2
58	Eating and Drinking Places	67	1,114	55
59	Miscellaneous Retail	68	493	51.1
	Finance, Insurance & Real Estate	**79**	**504**	**104.8**
60	Depository Institutions	11	126	35.1
61	No Depository Credit Institutions	10	63	18.4
62	Security and Commodity Brokers and Service	4	20	3.1
63	Insurance Carriers	1	11	1.5
64	Insurance Agents, Brokers and Service	21	84	19.6
65	Real Estate	29	187	25.6
67	Holding and Other Investment Offices	1	4	1.1
	Services	**407**	**3275**	**330.5**
70	Hotels and Other Lodging Places	2	9	0.4
72	Personal Services	60	375	12.6
73	Business Services (including software)	79	783	107.9
75	Automobile Repair, Services and Parking	28	169	10.8
76	Miscellaneous Repair Services	17	66	7.1
78	Motion Pictures	7	47	4
79	Amusement and Recreational Service (Ex. Movies)	31	222	15.9
80	Health Services	61	412	39.9
81	Legal Services	10	28	5.2

Summary Business Data – Woodinville Continued…

	Woodinville	Estab.	Employ.	Revenues
82	Educational Services	14	371	38.6
83	Social Services	23	228	11.8
84	Museums, Art Galleries, Zoos, Etc.	0	0	0
86	Membership Organizations	15	76	5.2
87	Eng, Acct, Research and Mgmt Related Services	57	480	70.5
89	Miscellaneous Services	3	9	0.6
90	**Public Administration (SIC 90-97)**	9	79	0
99	**Non-Classifiable Establishments**	36	881	0

Summary Business Data – North King County Cities

	North King County	Total Estab.	Total Employ.	Revenues
TOT	All Industries	4,960	60,986	6,587
MAN	All Manufacturing (SIC 20-39)	275	7,671	597
RET	All Retailing (SIC 52-59)	988	12,262	1,498
	Agriculture, Forestry and Fishing	**131**	**719**	**31**
1	Agricultural Production - Crops	2	30	3
2	Agricultural Production - Livestock	2	5	0
7	Agricultural Services	123	676	27
8	Forestry	1	1	0
9	Fishing, Hunting and Trapping	3	7	1
	Mining	**4**	**62**	**7**
10	Metal Mining	0	0	0
12	Coal Mining	0	0	0
13	Oil and Gas Extraction	2	29	4
14	Mining Nonmetallic, Except Fuels	2	33	4
	Construction	**513**	**4,605**	**772**
15	Building Construction and General Contractors	162	997	270
16	Heavy Construction, Except SIC 15	18	448	52
17	Construction-Special Trade Contractors	333	3,160	450
	Manufacturing	**275**	**7,671**	**597**
20	Food and Kindred Products	24	1,214	106
21	Tobacco Manufacturers	0	0	0
22	Textile Mill Products	1	4	0
23	Apparel and Other Fabric Products	5	188	12
24	Lumber and Wood Products, Except Furniture	9	148	16
25	Furniture and Fixtures	7	231	16
26	Paper and Allied Products	5	156	10
27	Printing, Publishing and Allied Industries	60	1,000	61
28	Chemicals and Allied Products	13	681	52
29	Petroleum Refining and Related Industries	0	0	0
30	Rubber and Miscellaneous Plastics Products	6	66	5
31	Leather and Leather Products	0	0	0
32	Stone, Clay, Glass and Concrete Products	4	94	3
33	Primary Metal Industries	4	188	18
34	Fabricated Metal Products	27	489	44
35	Industry and Commercial Machinery and Computers	31	554	57
36	Electrical and Electronic Equipment (Ex. Computers)	23	735	64
37	Transportation Equipment	7	107	8
38	Measuring and Analyzing Instruments	24	1,550	104
39	Miscellaneous Manufacturing Industries	25	266	21

Summary Business Data – North King County Continued…

	North King County	Total Estab.	Total Employ.	Revenues
	Transportation, Communication & Utilities	**113**	**1,483**	**193**
40	Railroad Transportation	0	0	0
41	Local, Suburban and Interurban Transportation	9	192	8
42	Motor Freight Transportation and Warehouse	30	298	38
43	U.S. Postal Service	6	179	2
44	Water Transportation	15	60	8
45	Transportation by Air	5	173	11
46	Pipe Lines, Except Natural Gas	0	0	0
47	Transportation Services	31	149	44
48	Communication	10	163	15
49	Electric, Gas and Sanitary Services	7	269	67
	Wholesale Trade	**291**	**5,182**	**838**
50	Wholesale Trade-Durable Goods	228	4,107	676
51	Wholesale Trade-Nondurable Goods	63	1,075	162
	Retail Trade	**988**	**12,262**	**1,498**
52	Building Materials, Garden Supply and Mobile Homes	69	1,521	217
53	General Merchandise Stores	24	1,111	123
54	Food Stores	94	1,491	246
55	Automobile Dealers and Gas Service Stations	103	904	231
56	Apparel and Accessory Stores	37	160	12
57	Home Furniture, Furnishings and Equipment	127	1,239	277
58	Eating and Drinking Places	263	4,105	201
59	Miscellaneous Retail	271	1,731	192
	Finance, Insurance & Real Estate	**447**	**3,419**	**630**
60	Depository Institutions	53	479	129
61	No Depository Credit Institutions	35	248	73
62	Security and Commodity Brokers and Service	30	125	20
63	Insurance Carriers	3	18	2
64	Insurance Agents, Brokers and Service	99	683	159
65	Real Estate	199	1,629	229
67	Holding and Other Investment Offices	8	33	8
	Services	**2,016**	**22,028**	**2,029**
70	Hotels and Other Lodging Places	20	204	8
72	Personal Services	265	1,048	44
73	Business Services (including software)	333	3,228	396
75	Automobile Repair, Services and Parking	112	759	85
76	Miscellaneous Repair Services	71	252	25
78	Motion Pictures	24	155	15
79	Amusement and Recreational Service (Ex. Movies)	130	2,005	121

Summary Business Data – North King County Continued…

	North King County	Total Estab.	Total Employ.	Revenues
80	Health Services	320	4,511	332
81	Legal Services	48	122	23
82	Educational Services	111	4,195	410
83	Social Services	158	1,861	110
84	Museums, Art Galleries, Zoos, Etc.	4	61	2
86	Membership Organizations	147	764	51
87	Eng, Acct, Research and Mgmt Related Services	260	2,837	408
89	Miscellaneous Services	13	26	2
			0	0
90	**Public Administration (SIC 90-97)**	77	2,208	0
99	**Non-Classifiable Establishments**	125	1,551	0

Summary Business Data – King County

	King County	Total Estab.	Total Employ.
TOT	**All industries**	82,422	1,172,845
MAN	**Manufacturing (SIC20-39)**	4,340	130,129
RET	**All Retailing (SIC 52-59)**	16,162	215,993
	Agriculture, Forestry and Fishing	**1,500**	**8,582**
01	Agricultural Production - Crops	34	229
02	Agricultural Production - Livestock	15	136
07	Agricultural Services	1,382	7,623
08	Forestry	18	175
09	Fishing, Hunting and Trapping	51	419
	Mining	**36**	**477**
10	Metal Mining	0	0
12	Coal Mining	0	0
13	Oil and Gas Extraction	14	108
14	Non-Metallic Industries, except fuels	22	369
	Construction	**5,314**	**49,145**
15	General Building Contractors	1,901	16,295
16	Heavy Construction Contractors	307	5,326
17	Special Trade Contractors	3,106	27,524
	Manufacturing	**4,340**	**130,129**
20	Food and Kindred Products	307	10,849
21	Tobacco Manufacturers	2	138
22	Textile Products	33	469
23	Apparel and Other Textile Products	132	2,061
24	Lumber & Wood Products	154	3,408
25	Furniture and Fixtures	94	2,186
26	Paper and Allied Products	114	5,590
27	Printing and Publishing	1,109	13,955
28	Chemicals and Allied Products	113	2,159
29	Petroleum and Coal Products	15	591
30	Rubber & Miscellaneous Plastic Products	101	2,711
31	Leather and Leather Products	9	121
32	Stone, Clay, Glass & Concrete Products	146	3,129
33	Primary Metal Industries	62	1,757
34	Fabricated Metal Products	393	8,795
35	Industrial Machinery & Computer Equipment	608	11,804
36	Electronic Equipment except computers	209	5,916
37	Transportation Equipment	143	38,307
38	Instruments & Related Products	223	8,900
39	Miscellaneous Manufacturing Industries	373	7,283

Summary Business Data – King County Continued…

	King County	Total Estab.	Total Employ.
	Transportation, Communication & Utilities	**2,768**	**75,956**
40	Railroad Transportation	11	351
41	Local & Interurban Passenger Transit	251	4,322
42	Trucking & Warehousing	709	10,970
43	US Postal Service	89	3,195
44	Water Transportation	237	4,476
45	Transportation By Air	162	26,916
46	Pipelines except Natural Gas	6	167
47	Transportation Services	702	9,275
48	Communications	473	13,582
49	Electric Gas and Sanitary Services	128	2,702
	Wholesale Trade	**4,354**	**57,890**
50	Wholesale Trade - Durable Goods	3,317	37,595
51	Wholesale Trade - Non-Durable Goods	1,037	20,295
	Retail Trade	**16,162**	**215,993**
52	Building Material & Garden Supplies	826	15,118
53	General Merchandise Stores	286	18,749
54	Food Stores	1,747	26,469
55	Automotive Dealers & Service Stations	1,400	20,810
56	Apparel & Accessory Stores	975	8,626
57	Furniture & Home Furnishing Stores	2,139	20,575
58	Eating & Drinking Places	4,704	73,945
59	Miscellaneous Retail	4,085	31,701
	Finance, Insurance & Real Estate	**7,687**	**80,784**
60	Depository Institutions	844	11,320
61	Non-Depository Credit Institutions	859	8,585
62	Security, Commodity Brokers and Services	883	7,554
63	Insurance Carriers	113	3,829
64	Insurance Agents, Brokers and Service	1,273	16,240
65	Real Estate	3,408	28,958
67	Holding & Other Investment Offices	307	4,298
	Services	**35,925**	**485,738**
70	Hotels and Other Lodging Places	448	17,166
72	Personal Services	4,204	16,662
73	Business Services	5,509	79,090
75	Automotive Repair Services & Parking	2,086	13,584
76	Miscellaneous Repair Services	892	3,706
78	Motion Pictures	377	2,600
79	Amusement & Recreation Services	1,683	24,724
80	Health Services	5,952	117,047
81	Legal Services	2,805	17,936
82	Educational Services	1,548	93,285
83	Social Services	2,938	32,354

Summary Business Data – King County Continued…

	King County	Total Estab.	Total Employ.
84	Museums, Botanical & Zoological Gardens	97	1,384
86	Membership Organizations	2,492	18,756
87	Engineering, Accounting & Management	4,593	45,865
89	Other Services	301	1,579
90	**Public Administration**	1,425	44,484
99	**Non-Classifiable Establishments**	2,911	23,667

Summary Business Data – Seattle MSA

	Seattle MSA	Total Estab.	Total Employ.
TOT	**All industries**	105,929	1,453,922
MAN	**Manufacturing (SIC20-39)**	5,642	177,942
RET	**All Retailing (SIC 52-59)**	21,100	273,424
	Agriculture, Forestry and Fishing	**2,209**	**12,527**
01	Agricultural Production – Crops	66	497
02	Agricultural Production – Livestock	28	241
07	Agricultural Services	2,026	11,008
08	Forestry	25	323
09	Fishing, Hunting and Trapping	64	458
	Mining	**49**	**875**
10	Metal Mining	0	0
12	Coal Mining	0	0
13	Oil and Gas Extraction	18	144
14	Non-Metallic Industries, except fuels	31	731
	Construction	**7,984**	**69,110**
15	General Building Contractors	2,754	22,191
16	Heavy Construction Contractors	424	7,437
17	Special Trade Contractors	4,806	39,482
	Manufacturing	**5,642**	**177,942**
20	Food and Kindred Products	362	12,340
21	Tobacco Manufacturers	2	138
22	Textile Products	38	507
23	Apparel and Other Textile Products	165	2,438
24	Lumber & Wood Products	260	6,052
25	Furniture and Fixtures	116	2,885
26	Paper and Allied Products	130	6,747
27	Printing and Publishing	1,323	16,767
28	Chemicals and Allied Products	135	2,944
29	Petroleum and Coal Products	19	732
30	Rubber & Miscellaneous Plastic Products	125	3,224
31	Leather and Leather Products	12	162
32	Stone, Clay, Glass & Concrete Products	182	3,910
33	Primary Metal Industries	78	2,148
34	Fabricated Metal Products	531	11,413
35	Industrial Machinery & Computer Equipment	811	15,051
36	Electronic Equipment except computers	282	8,687
37	Transportation Equipment	223	63,148
38	Instruments & Related Products	296	11,720
39	Miscellaneous Manufacturing Industries	552	6,929

Summary Business Data – Seattle MSA Continued…

	Seattle MSA	Total Estab.	Total Employ.
	Transportation, Communication & Utilities	**3,474**	**85,903**
40	Railroad Transportation	17	436
41	Local & Interurban Passenger Transit	320	6,263
42	Trucking & Warehousing	966	13,587
43	US Postal Service	123	3,678
44	Water Transportation	281	4,821
45	Transportation By Air	193	27,238
46	Pipelines except Natural Gas	8	171
47	Transportation Services	821	9,914
48	Communications	550	14,575
49	Electric Gas and Sanitary Services	195	5,220
	Wholesale Trade	**5,387**	**69,437**
50	Wholesale Trade - Durable Goods	4,108	46,122
51	Wholesale Trade - Non-Durable Goods	1,279	23,315
	Retail Trade	**21,100**	**273,424**
52	Building Material & Garden Supplies	1,193	20,774
53	General Merchandise Stores	384	24,072
54	Food Stores	2,341	35,040
55	Automotive Dealers & Service Stations	1,926	27,602
56	Apparel & Accessory Stores	1,186	10,346
57	Furniture & Home Furnishing Stores	2,682	23,910
58	Eating & Drinking Places	5,961	92,190
59	Miscellaneous Retail	5,427	39,490
	Finance, Insurance & Real Estate	**9,743**	**97,370**
60	Depository Institutions	1,141	14,499
61	Non-Depository Credit Institutions	1,093	10,808
62	Security, Commodity Brokers and Services	1,037	8,231
63	Insurance Carriers	140	3,941
64	Insurance Agents, Brokers and Service	1,695	19,531
65	Real Estate	4,306	35,741
67	Holding & Other Investment Offices	331	4,619
	Services	**45,160**	**571,633**
70	Hotels and Other Lodging Places	648	19,426
72	Personal Services	5,509	21,442
73	Business Services	6,729	88,535
75	Automotive Repair Services & Parking	2,832	16,740
76	Miscellaneous Repair Services	1,260	4,607
78	Motion Pictures	464	3,247
79	Amusement & Recreation Services	2,186	31,123
80	Health Services	7,353	138,094
81	Legal Services	3,184	19,142
82	Educational Services	2,029	110,740

Summary Business Data – Seattle MSA Continued…

	Seattle MSA	Total Estab.	Total Employ.
83	Social Services	3,658	40,315
84	Museums, Botanical & Zoological Gardens	123	1,544
86	Membership Organizations	3,322	22,659
87	Engineering, Accounting & Management	5,511	52,324
89	Other Services	352	1,695
90	**Public Administration**	1,928	69,652
99	**Non-Classifiable Establishments**	3,253	26,049

Summary Business Data – State of Washington

	Washington	Total Estab.	Total Employ.
TOT	**All industries**	247,614	3,063,758
MAN	**Manufacturing (SIC20-39)**	12,306	325,562
RET	**All Retailing (SIC 52-59)**	50,039	590,159
	Agriculture, Forestry and Fishing	**6,345**	**51,111**
01	Agricultural Production - Crops	759	17,276
02	Agricultural Production - Livestock	242	2,372
07	Agricultural Services	5,057	27,939
08	Forestry	140	2,608
09	Fishing, Hunting and Trapping	147	916
	Mining	**131**	**1,649**
10	Metal Mining	1	1
12	Coal Mining	0	0
13	Oil and Gas Extraction	49	352
14	Non-Metallic Industries, except fuels	81	1,296
	Construction	**20,616**	**157,204**
15	General Building Contractors	7,345	49,346
16	Heavy Construction Contractors	1,271	20,509
17	Special Trade Contractors	12,000	87,349
	Manufacturing	**12,306**	**325,562**
20	Food and Kindred Products	980	42,270
21	Tobacco Manufacturers	2	138
22	Textile Products	64	1,343
23	Apparel and Other Textile Products	304	3,714
24	Lumber & Wood Products	1,132	26,610
25	Furniture and Fixtures	214	4,306
26	Paper and Allied Products	239	19,196
27	Printing and Publishing	2,493	31,350
28	Chemicals and Allied Products	316	6,302
29	Petroleum and Coal Products	58	2,162
30	Rubber & Miscellaneous Plastic Products	258	7,094
31	Leather and Leather Products	31	359
32	Stone, Clay, Glass & Concrete Products	409	8,058
33	Primary Metal Industries	170	7,103
34	Fabricated Metal Products	1,148	23,176
35	Industrial Machinery & Computer Equipment	1,743	26,271
36	Electronic Equipment except computers	497	16,089
37	Transportation Equipment	487	70,963
38	Instruments & Related Products	483	15,374
39	Miscellaneous Manufacturing Industries	1,278	13,684

Summary Business Data – Washington State Continued…

	Washington	Total Estab.	Total Employ.
	Transportation, Communication & Utilities	**9,128**	**160,746**
40	Railroad Transportation	63	1,674
41	Local & Interurban Passenger Transit	761	15,176
42	Trucking & Warehousing	3,247	39,210
43	US Postal Service	600	8,232
44	Water Transportation	664	7,535
45	Transportation By Air	348	28,918
46	Pipelines except Natural Gas	37	576
47	Transportation Services	1,366	14,358
48	Communications	1,370	27,742
49	Electric Gas and Sanitary Services	672	17,325
	Wholesale Trade	**11,786**	**166,315**
50	Wholesale Trade - Durable Goods	8,471	93,706
51	Wholesale Trade - Non-Durable Goods	3,315	72,609
	Retail Trade	**50,039**	**590,159**
52	Building Material & Garden Supplies	3,511	51,005
53	General Merchandise Stores	970	55,866
54	Food Stores	6,143	84,694
55	Automotive Dealers & Service Stations	5,160	63,137
56	Apparel & Accessory Stores	2,475	17,983
57	Furniture & Home Furnishing Stores	5,766	41,437
58	Eating & Drinking Places	12,784	191,835
59	Miscellaneous Retail	13,230	84,202
	Finance, Insurance & Real Estate	**21,098**	**174,981**
60	Depository Institutions	2,788	32,152
61	Non-Depository Credit Institutions	2,215	18,896
62	Security, Commodity Brokers and Services	2,020	13,569
63	Insurance Carriers	307	5,857
64	Insurance Agents, Brokers and Service	3,822	32,974
65	Real Estate	9,422	64,063
67	Holding & Other Investment Offices	524	7,470
	Services	**101,384**	**1,183,957**
70	Hotels and Other Lodging Places	2,610	48,461
72	Personal Services	13,026	46,085
73	Business Services	13,253	145,963
75	Automotive Repair Services & Parking	7,142	37,270
76	Miscellaneous Repair Services	3,227	10,065
78	Motion Pictures	943	6,977
79	Amusement & Recreation Services	5,035	64,567
80	Health Services	15,819	305,454
81	Legal Services	5,579	29,284

Summary Business Data – Washington State Continued…

	Washington	Total Estab.	Total Employ.
82	Educational Services	5,341	242,969
83	Social Services	8,822	105,464
84	Museums, Botanical & Zoological Gardens	309	2,871
86	Membership Organizations	9,258	51,142
87	Engineering, Accounting & Management	10,337	84,080
89	Other Services	683	3,305
90	**Public Administration**	9,011	207,574
99	**Non-Classifiable Establishments**	5,770	44,500